



Regular Town Council Meeting

Tuesday, June 11, 2024 at 5:00 PM

Theodore D. Washington Municipal Building, Henry "Emmett" McCracken Jr. Council Chambers,
20 Bridge Street, Bluffton, SC

AGENDA

This meeting can be viewed live on [BCTV](#), on Hargray Channel 9 and 113 or on Spectrum Channel 1304.

I. CALL TO ORDER

II. PLEDGE OF ALLEGIANCE

III. INVOCATION

IV. ADOPTION OF THE MINUTES

- [1.](#) Regular Meeting Minutes of 5/14/2024
- [2.](#) Budget Workshop Meeting Minutes 5/16/2024
- [3.](#) Budget Workshop Meeting Minutes 5/30/2024

V. PRESENTATIONS, CELEBRATIONS, AND RECOGNITIONS

1. Beaufort County School District Character Student of the Month - Mayor Larry Toomer
2. Beaufort County School District Character Student of the Month - Mayor Larry Toomer
3. Juneteenth Proclamation - Mayor Larry Toomer
4. National Gun Violence Awareness Day Proclamation - Mayor Larry Toomer

VI. PUBLIC COMMENT

VII. COMMUNICATIONS FROM MAYOR AND COUNCIL

VIII. PUBLIC HEARING & FINAL READING

- [1.](#) Consideration of an Ordinance Approving the Town of Bluffton Fiscal Year 2025 Proposed Consolidated Budget. – Public Hearing and Final Reading – Stephen Steese, Town Manager

IX. FORMAL AGENDA ITEMS

- [1.](#) Destination Marketing Organization Annual Marketing Plan and Consideration of a Resolution for the FY2025 Budget and Marketing Plan Presented by the Hilton Head Island-Bluffton Chamber of Commerce in Accordance with Contract 2022-35 as the Town of Bluffton's Designated Marketing Organization. – Ariana Pernice, Vice-President Visitor & Convention

Bureau, Hilton Head Island-Bluffton Chamber of Commerce and Natalie Majorkiewicz, Director of Finance

- [2.](#) Consideration of an Ordinance Amending the Town of Bluffton Code of Ordinances, Chapter 24, Taxation. - Second & Final Reading - Natalie Majorkiewicz, Director of Finance
- [3.](#) Consideration of Accommodations Tax Advisory Committee Funding Recommendations for Quarter Ending March 31, 2024. - Natalie Majorkiewicz, Director of Finance

2a. Society of Bluffton Artists: 30th Anniversary - ATAC Recommends \$20,000

2b. Hilton Head Symphony Orchestra: 2024 Bluffton Concerts - ATAC Recommends \$43,632

2c. BlacQuity: 2024 River and Roots Festival - ATAC Recommends \$25,000

2d. MLK Observance Committee: 9th Annual Bluffton Juneteenth Festival Weekend - ATAC Recommends \$20,000

2e. Historic Bluffton Foundation: Heyward House Welcome Center Q1 Allocation - ATAC Recommends \$40,000

- [4.](#) Consideration of an Ordinance to Amend the Town of Bluffton's Comprehensive Plan ("Blueprint Bluffton") to Incorporate a Housing Impact Analysis - First Reading (Kevin Icard, Director of Growth Management)
- [5.](#) Consideration of An Ordinance Authorizing an Economic Development Incentive Agreement Between the Town of Bluffton and Palmetto Land Associates, LLC in Support of the Development of 11,800 Square Feet of Medical and Healthcare Facility Space. – Second & Final Reading – David Nelems, CEO Don Ryan Center of Innovation

X. CONSENT AGENDA ITEMS

- [1.](#) Monthly Department Reports: Police, Finance and Administration, Human Resources, Municipal Court, Projects & Watershed Resilience, Public Services, Don Ryan Center for Innovation, and Growth Management
- [2.](#) Town Manager Monthly Report
- [3.](#) Consideration of Approval of a Resolution Approving Town of Bluffton Council to be Active Employees Under the South Carolina Public Employee Benefit Authority Employer Participation Resolution. - Anni Evans, Director of Human Resources
- [4.](#) Consideration to Approve a Resolution for Execution of Memorandums of Agreement Renewals Between the Town of Bluffton and Intergovernmental Entity the Beaufort County School District for School Resource Officers and Crossing Guards. – Felicia Roth, Director of Compliance and Contracts
- [5.](#) Consideration to Approve a Resolution for Execution of an Intergovernmental Agreement Renewal Between the Town of Bluffton and the Public Defenders Office. - Felicia Roth, Director of Compliance and Contracts
- [6.](#) Consideration of Memorandums of Agreement Renewals Between the Town of Bluffton and Intergovernmental Entities and Non-Profits Including the Historic Bluffton Foundation for

Welcome Center Services and University of SC Beaufort for the Bluffton Ambassador Program.
– Felicia Roth, Director of Compliance and Contracts

7. Consideration to Approve a Resolution to Execute a Contract Between the Town of Bluffton and Bluffton Township Fire District to for Vehicle Maintenance. – Felicia Roth, Director of Compliance and Contracts

8. Consideration of a Resolution Affirming Council's Support of the Town of Bluffton's Designation as a South Carolina Cultural Arts District and to Designate the Public Art Committee as the Cultural Arts District Steering Committee. – Stephen Steese, Town Manager

XI. EXECUTIVE SESSION

1. Personnel Matters Regarding Town Council Appointments of Boards, Committees, and Commissions (Pursuant to Freedom of Information Act 30-4-70 [a][1])

XII. ACTION FROM EXECUTIVE SESSION

XIII. ADJOURNMENT

NEXT MEETING DATE: TUESDAY, JULY 09, 2024

"FOIA Compliance – Public notification of this meeting has been published and posted in compliance with the Freedom of Information Act and the Town of Bluffton policies."

In accordance with the requirements of Title II of the Americans with Disabilities Act of 1990 ("ADA"), the Town of Bluffton will not discriminate against qualified individuals with disabilities on the basis of disability in its services, programs, or activities. The Town of Bluffton Council Chambers are ADA compatible. Auditory accommodations are available. Any person requiring further accommodation should contact the Town of Bluffton ADA Coordinator at 843.706.4500 or adacoordinator@townofbluffton.com as soon as possible but no later than 48 hours before the scheduled event.

Executive Session – The public body may vote to go into executive session for any item identified for action on the agenda.

**Please note that each member of the public may speak at one public comment session and a form must be filled out and given to the Town Clerk. To submit a public comment online, please click here:*

<https://www.townofbluffton.sc.gov/FormCenter/Town-15/Public-Comment-60>

Public comment is limited to 3 minutes per speaker.

Regular Town Council Meeting

May 14, 2024

I. CALL TO ORDER

Mayor Toomer called the meeting to order at 5:00 PM.

II. PLEDGE OF ALLEGIANCE

The Pledge of Allegiance was led by Mayor Toomer.

III. INVOCATION

The Invocation was given by Councilmember Frazier.

IV. ADOPTION OF THE MINUTES

1. Regular Meeting Minutes of 04/09/2024

A motion made by Councilmember Hamilton, Seconded by Mayor Pro-Tempore to approve the Regular Meeting Minutes of 04/09/2024 as submitted.

V. PRESENTATIONS, CELEBRATIONS, AND RECOGNITIONS

1. Beaufort County School District Character Student of the Month - Mayor Larry Toomer

Beaufort County School District Character Student of the Month, Myles Kraychar was not present. The 8th grade student from H.E. McCracken Middle School will be honored at 06/11/2024 Town Council meeting.

2. National Mental Health Substance Use Prevention Month Proclamation - Mayor Larry Toomer

Ms. Aviana Stephens, a member of Teens for Healthy Youth, accepted the May Mental Health Proclamation on behalf of LowCountry Alliance for Healthy Youth.

3. Tourette Syndrome Awareness Month Proclamation - Mayor Larry Toomer

David Roth accepted the Tourette Syndrome Awareness Month Proclamation.

4. Proclamation for Tuberous Sclerosis Complex Global Awareness Day - Mayor Larry Toomer

Amy Bredeson was not in attendance to receive the Proclamation for Tuberous Sclerosis Complex Global Awareness Day.

VI. PUBLIC COMMENT

Christina Stover - 82 Buck Island Rd, Apt 106 - Ms. Stover addressed speeding concerns in the area of Calhoun Street.

Sharon Brown - 163 Buck Island Road - Ms. Brown expressed concerns regarding communications with staff regarding the legal matter regarding Councilmember Frazier and racial injustices within the community.

Karen Arms - 40 Dragon Flu Drive - Ms. Arms discussed an occurrence during Mayfest. She spoke to council regarding her vehicle being towed, lack of signage and cash being the only means of payment to the towing company.

VII. COMMUNICATIONS FROM MAYOR AND COUNCIL

Councilmember Frazier congratulated the class of 2024.

Mayor Pro-Tempore Wood stated the Beaufort Jasper Volunteers in Medicine annual gala was well supported. He thanked everyone who attended for their support.

Mayor Larry Toomer expressed his thankfulness for the many prayers, texts and kind words in the passing of his nother-in-law.

VIII. PUBLIC HEARING & FINAL READING

1. Consideration of an Ordinance to Amend Certain Sections of the Town of Bluffton's Municipal Code of Ordinances, Chapter 23, Unified Development Ordinance, Article 5 – Design Standards, Sec. 5.4 (Wetlands) and Sec. 5.10 (Stormwater); and, Article 9 – Definitions and Interpretations, Sec. 9.2 (Defined Terms). Public Hearing and Final Reading - Kevin Icard, Director of Growth Management

A motion made by Mayor Pro-Tempore Wood, Seconded by Councilmember Hamilton to approve the Ordinance to Amend Certain Sections of the Town of Bluffton's Municipal Code of Ordinances, Chapter 23, Unified Development Ordinance, Article 5 – Design Standards, Sec. 5.4 (Wetlands) and Sec. 5.10 (Stormwater); and, Article 9 – Definitions and Interpretations, Sec. 9.2 (Defined Terms).

Town Council unanimously approved the second and final reading of this ordinance.

2. Consideration of an Ordinance to Approve an Amendment to the Town of Bluffton Zoning Map to Rezone Certain Real Property Owned by Cornerstone Church of Bluffton and Lalie Ann Mole Consisting of Approximately 43.31 Acres, More or Less, Located at 11 Grassey Lane and 21 Lake Lane and Identified by Beaufort County Tax Map Nos. R610 036 000 0014 0000 and R610 036 000 014B 0000 from Planned Unit Development Zoning District to a Mix of Agricultural Zoning and Rural Mixed Use Zoning Districts (ZONE-02-24-018921). - Public Hearing and Final Reading - Kevin Icard, Director of Growth Management

A motion made by Councilmember Hamilton, Seconded by Mayor Pro-Tempore Wood to approve an Ordinance to Amend the Town of Bluffton Zoning Map to Rezone Certain Real Property Owned by Cornerstone Church of Bluffton and Lalie Ann Mole Consisting of Approximately 43.31 Acres, More or Less, Located at 11 Grassey Lane and 21 Lake Lane and Identified by Beaufort County Tax Map Nos. R610 036 000 0014 0000 and R610 036 000 014B 0000 from Planned Unit Development Zoning District to a Mix of Agricultural Zoning and Rural Mixed Use Zoning Districts (ZONE-02-24-018921)

Town Council unanimously approved the second and final reading of this ordinance.

XI. FORMAL AGENDA ITEMS

1. Consideration of an Ordinance Authorizing the Conveyance of Certain Real Property Owned by the Town of Bluffton to Workforce State of Mind, LLC, Located at 1095 May River Road and Consisting of 1.78 Acres, More or Less, and Identified by Beaufort County Tax Map No. R610 039 000 0498 0000; and, Authorizing the Execution and Recording of Associated Documents. – Second and Final Reading - Heather Colin, Assistant Town Manager

A motion made by Councilmember Frazier, Seconded by Councilmember Hamilton to approve an Ordinance Authorizing the Conveyance of Certain Real Property Owned by the Town of Bluffton to Workforce State of Mind, LLC, Located at 1095 May River Road and Consisting of 1.78 Acres, More or Less, and Identified by Beaufort County Tax Map No. R610 039 000 0498 0000; and, Authorizing the Execution and Recording of Associated Documents.

Town Council unanimously approved the second and final reading of this ordinance.

2. Consideration of an Ordinance Approving the Town of Bluffton Fiscal Year 2025 Proposed Consolidated Budget. – First Reading – Stephen Steese, Town Manager

A motion made by Councilmember Burden, Seconded by Councilmember Hamilton to approve an Ordinance Approving the Town of Bluffton Fiscal Year 2025 Proposed Consolidated Budget on First Reading.

Town Council unanimously approved the first reading of this ordinance.

3. Consideration of an Ordinance Amending the Town of Bluffton Code of Ordinances, Chapter 24, Taxation. - First Reading - Natalie Majorkiewicz, Director of Finance

A motion made by Mayor Pro-Tempore Wood, Seconded by Councilmember Hamilton to approve an Ordinance Amending the Town of Bluffton Code of Ordinances, Chapter 24, Taxation. - First Reading

Town Council unanimously approved the first reading of this ordinance.

4. Consideration of a Resolution to Adopt the Buck Island-Simmons ville Neighborhood Plan Update - Public Meeting - Kevin Icard, Director of Growth Management

A motion made by Councilmember Frazier, Seconded by Mayor Pro-tempore Wood to approve a Resolution to Adopt the Buck Island - Simmons ville Neighborhood Plan Update with the conditions of updating the timeline for action item number four in Land Use and Zoning from February 2025 to July 2024, update strategy item number 8 in Public Infrastructure based on the proposed Drainage Plan for the area, strategy item number 8 in Community Involvement and Identity to create a Town supported committee for the Buck Island – Simmons ville neighborhood; the committee will enhance and preserve the identity of the neighborhood and work to implement this plan, in accordance with the Town's Strategic Plan, and research additional incentives to help support affordable housing.

Town Council unanimously approved the resolution with conditions.

5. Consideration for the Acceptance of Bryant Holding, LLC's One Hundred Percent (100%) Annexation Petition to Annex Certain Real Property Contiguous to the Town of Bluffton's Corporate Boundaries Consisting of a Total of 2.14 Acres, More or Less, Located at 30 Davis Road and Bearing Beaufort County Tax Map No. R600 029 000 0028 0000 (ANNX-03-24-019045). – Kevin Icard, Director of Growth Management

A motion made by Mayor Pro-Tempore Wood, Seconded by Councilmember Frazier for the Acceptance of Bryant Holding, LLC's One Hundred Percent (100%) Annexation Petition to Annex Certain Real Property Contiguous to the Town of Bluffton's Corporate Boundaries Consisting of a Total of 2.14 Acres, More or Less, Located at 30 Davis Road and Bearing Beaufort County Tax Map No. R600 029 000 0028 0000 (ANNX-03-24-019045).

Town Council unanimously approved the annexation petition.

6. Consideration of An Ordinance Authorizing an Economic Development Incentive Agreement Between the Town of Bluffton and Palmetto Land Associates, LLC in Support of the Development of 11,800 Square Feet of Medical and Healthcare Facility Space. – First Reading – Chris Forster, Assistant Town Manager

A motion made by Councilmember Burden, Seconded by Councilmember Hamilton to Approve the First Reading an Ordinance Authorizing an Economic Development Incentive Agreement Between the Town of Bluffton and Palmetto Land Associates, LLC in Support of the Development of 11,800 Square Feet of Medical and Healthcare Facility Space.

Town Council unanimously approved the first reading of this ordinance.

7. Consideration to Authorize a Contract Renewal with Palmetto Bluff Preservation Trust, Inc. to Reimburse for Residential Trash Removal Services in the Palmetto Bluff Community for the Calendar Year 2024 (Fiscal Impact: \$193,744). – Chris Forster, Assistant Town Manager

A motion made by Councilmember Burden, Seconded by Mayor Pro-tempore Wood to Authorize a Contract Renewal with Palmetto Bluff Preservation Trust, Inc. to Reimburse for Residential Trash Removal Services in the Palmetto Bluff Community for the Calendar Year 2024 (Fiscal Impact: \$193,744).

Town Council unanimously approved the contract renewal.

X. CONSENT AGENDA ITEMS

A motion made by Councilmember Hamilton, Seconded by Councilmember Frazier to approve the consent agenda as presented after discussion item #3 regarding the new Memo of Agreement with Beaufort County for the implementation of the May River Watershed Action Plan.

Town Council unanimously approved the Consent Agenda as presented.

1. Monthly Department Reports: Police, Finance & Administration, Human Resources, Municipal Court, Projects & Watershed Resilience, Public Services, Don Ryan Center for Innovation, and Growth Management
2. Town Manager Monthly Report
3. Consideration of the May River Watershed Action Plan Advisory Committee's Recommendation for Town Council to Pursue a New Memorandum of Agreement with Beaufort County for Implementation of the May River Watershed Action Plan Throughout the May River Watershed. - Kimberly Washok-Jones, Director of Projects and Watershed Resilience
4. Kids to Parks Day Proclamation - Mayor Larry Toomer
5. Historic Preservation Month Proclamation - Mayor Larry Toomer
6. Building Safety Month Proclamation - Mayor Larry Toomer

XI. EXECUTIVE SESSION

1. Legal and Personnel Matters Relating to the Receipt of Legal Advice Regarding Police Department Expert Review (Pursuant to SC Freedom of Information Act 30-4-70[a] [1],[2])

2. Personnel Matters Relating to Town Manager Annual Review (Pursuant to SC Freedom of Information Act 30-4-70[a][1])

XII. ACTION FROM EXECUTIVE SESSION

1. No action taken on Legal and Personnel Matters Relating to the Receipt of Legal Advice Regarding Police Department Expert Review.
2. Personnel Matters Relating to Town Manager Annual Review (Pursuant to SC Freedom of Information Act 30-4-70[a][1])

Motion made by Mayor Pro-Tempore, Seconded by Councilmember Frazier to grant a 4% increase to Stephen Steese effective June 1, 2024.

Motion made by Mayor Pro-Tempore, Seconded by Councilmember Frazier that the automatic extension in Section 1 (B) and (C) of the contract of employment dated June 14, 2021 be terminated effectively immediately, and to include a bonus of \$5,000.

Section 1 of Employment Agreement:

- B. Thereafter, this Agreement shall automatically extend for periods of two (2) years, commencing on June 14th of any calendar year and ending on June 13th of the following year.
- C. The Town Council may terminate the automatic two (2) year extensions by taking a public vote to do so prior to June 1 of any calendar year, beginning with the calendar year 2022. In the event Council votes to terminate the automatic extension, the termination shall be effective for the automatic extension that would begin on June 14th of the following calendar year (e.g., in the event of a vote to terminate the automatic extensions taken as of June 1, 2023, the term of employment would end on June 13, 2025).

XIII. ADJOURNMENT

The Town Council meeting adjourned at 9:52 PM.

Budget Workshop Meeting

May 16, 2024

I. CALL TO ORDER

The workshop was called to order at 5:00 PM.

PRESENT

Mayor Larry Toomer

Mayor Pro-Tempore Dan Wood

Councilmember Fred Hamilton

Councilmember Emily Burden

ABSENT

Councilmember Bridgette Frazier

II. PUBLIC COMMENT

There was no Public Comment.

III. Workshop Items:

Stephen Steese, Town Manager presented on each of the following topics:

1. General Fund

FY 2025 Consolidated budget topics:

Town of Bluffton Economic Factors, FY25 Budget Goals, FY25 Proposed Budget Overview and FY25 Budget Review & Approval Process

2. Special Revenues Fund

Special Revenues Funds topics:

Hospitality Tax Fund and Locally Accommodations Tax Fund

3. Stormwater Fund

Stormwater Fund topics:

The Regional Stormwater Utility Fee Comparison, FY25 Proposed Stormwater Fund Budget Revenues, and FY25 Proposed Stormwater Fund Budget Expenditures

4. Debt Services Fund

Debt Services Fund topics:

Legal Debt Margin Calculations as a Percentage of Debt Limit, FY25 Debt Services Fund Highlights - General Obligation Bonds, FY25 Debt Services Fund Highlights - TIF Special Revenue Bonds, FY25 Debt Services Fund Budget Revenues, FY25 Debt Services Fund Budget Expenditures, Funds Balance, FY25 Proposed Consolidated Budget

IV. Adjournment

The workshop adjourned at 6:39 PM.

Budget Workshop Meeting

May 30, 2024

I. Call to Order

The workshop was called to order at 5:00 PM.

II. Public Comment

There was no Public Comment.

III. Workshop Items:

1. Hilton Head - Bluffton Chamber of Commerce Annual DMO Presentation

Ariana Pernice, Vice-President Visitor & Convention Bureau, Hilton Head Island-Bluffton Chamber of Commerce presented the annual DMO to Council.

2. Lowcountry Regional Transport Authority - Mary Lou Franzoni, Executive Director

Mary Lou Franzoni, Executive Director, conducted the annual Lowcountry Regional Transport Authority presentation.

3. Discussion of Carryover Items from May 16, 2024, Budget Workshop Meeting

Discussions for carryover:

Currently the Bluffton Police Department only accepts cash as a form of payment. A new procedure is being investigated to provide other options of payment to include cash, check and card.

Beaufort County is working to amend the single use plastic ordinance to extend the products covered within the current ordinance. This amendment of the ordinance failed at first reading. If the Town Council would like to investigate the topic, further information will be provided. Councilmember Frazier discussed the possibility of an incentive program to food and beverage customers to be discussed at a future date.

Councilmember Frazier discussed the position of a mental health professional to give services in a mental health crisis. She would like staff to revisit what the position was intended and doing right by the intended budgeted position. Stephen Steese discussed partnerships with outside agencies to be further explored to meet the intended needs of the position and hiring in the future.

4. Capital Improvement Program Fund

Stephen Steese - Town Manager, conducted the presentation for the Capital Improvement Program Funding.

The topics for discussion were as follows as well as a breakdown of the Capital Improvement Program Process:

FY25 Proposed Consolidated Budget with each transfer being made by category/project name: General Fund, Hospitality Tax Fund, Local Accommodations Tax Fund, Stormwater Fund, Debt Services Fund.

IV. Adjournment

The workshop adjourned at 7:06 PM.

DRAFT

TOWN COUNCIL
STAFF REPORT



MEETING DATE:	June 11, 2024
PROJECT:	Formal Item: Consideration of an Ordinance Approving the Town of Bluffton Fiscal Year 2025 Proposed Consolidated Budget – Public Hearing & Final Reading
PROJECT MANAGER:	Stephen Steese, Town Manager

REQUEST:

Town Council approves the first reading of the Ordinance for the Town of Bluffton FY 2025 Consolidated Budget of \$90,620,863, guided by the Town Mission statement and the Town of Bluffton Strategic Plan Action Agenda for FY 2025.

The total budget includes approved funding from the Regional Housing Trust Fund of \$144,000 to support the Neighborhood Assistance Program in the General Fund. This is the only change from 1st Reading held on May 14, 2024.

BACKGROUND AND DISCUSSION:

This financial plan supports our Bluffton Town Vision that states, “Bluffton, the Heart of the Lowcountry, a Town that appreciates the past, focuses on today and is planning together for a greater future.” This financial plan provides the resources and staff for all our commitments to making Bluffton a better place.

The consolidated budget concentrates on the Town of Bluffton Strategic Plan Priority Focus Areas that include May River & Surrounding Rivers and Watersheds, Town Organization, Economic Growth, Fiscal Sustainability, Community Quality of Life, Housing, and Infrastructure.

The consolidated budget for FY2025 consists of six major funds, which includes two Special Revenue Funds, Hospitality Tax Fund and Local Accommodations Tax Fund, as well as the General Fund, the Stormwater Fund, the Capital Improvements Program (CIP) Fund, and the Debt Service Fund.

The proposed consolidated budget is a decrease of 2.0% or \$1,805,551 from the revised FY2024 budget. The budget keeps the tax millage rate the same at 36.0, which reflects General Fund mills of 34.3 and Debt Service Fund mills of 1.7 mills.

There are changes proposed to the Master Fee Schedule for the following:

- Section II – Police Department Fees
 - Adding USB Thumb Drive of \$20 for media too large for CD/DVD
- Section VI – Growth Management Fees
 - Building Safety Fees:
 - Add additional language to 4th copy: “4th copy of Building Plans for Remarketing/Rechecking of Single Family Plans at Time of Initial Submittal”
 - Plan checking fees changes remarketing/rechecking of residential from \$50 to \$100 for consistency.

- Section VII – Stormwater Management Fees due to inconsistencies
 - Update Item/Description Title from “Erosion Control Inspection & Re-Inspection Fees” to “Erosion Control Inspection Fees” as there is a separate Re-Inspection section just below.
 - Re-Inspection Resulting for Notice of Violation Fee
 - Residential <1 acre (not part of subdivision) from \$150 to \$200
 - Remove “\$200.00 to remove Stop Work Order”
 - Adding “Re-Inspection Resulting from Stop Work Order (SWO)”:
 - Residential <1 acre (not part of subdivision): \$200
 - Residential (single family or subdivision), Multi-family, or Non-Residential per disturbed acre (round up to the next whole acre) as follows:
 - 0.0-0.99 acres: \$200
 - 1.0-5.0 acres: \$300
 - 5.01-10 acres: \$400
 - 10.01+ acres: \$500
 - Removing “Residential” from Notice of Termination (NOT) Inspection and Re-Inspection Fees

CURRENT STATUS:

The General Fund accounts for and reports the financial resources for the Town’s primary operating fund. Principal sources of revenue are property taxes and licenses and permit fees. The General Fund budget is 35.8% or \$32,468,440 of the consolidated budget. Budget details are available in the attached Executive Consolidated Budget Summary.

Hospitality Tax Fund is used to account for the local hospitality tax fees of two percent (2%) by the Town for use in tourism related expenditures and related Capital Improvements Projects. The Hospitality Tax Fund proposed budget is \$8,248,866 or 9.1% of the consolidated budget and supports transfers to the General Fund and Capital Improvement Program Fund for allowable projects and expenditures. Budget details are available in the attached Executive Consolidated Budget Summary.

Local Accommodations Tax Fund is used to account for the local accommodations tax fees of three percent (3%) by the Town for use in tourism related expenditures and related Capital Improvements Projects. The Local Accommodations Tax Fund proposed budget is \$2,165,606 or 2.4% of the consolidated budget and supports transfers to the General Fund and Capital Improvement Program Fund for allowable projects and expenditures. Budget details are available in the attached Executive Consolidated Budget Summary.

The Stormwater Fund accounts for and reports the financial resources of all stormwater-related expenditures including Watershed Management staffing and operations, routine watershed maintenance and capital projects. The primary source of revenue is stormwater utility fees. The Stormwater Fund budget is 4.4% or \$4,017,671 of the consolidated budget and includes a transfer to the Debt Service Fund to pay the principal and interest on General Obligations bonds issued for stormwater and sewer projects. Budget details are available in the attached Executive Consolidated Budget Summary.

Capital Improvement Program (CIP) Fund accounts for and reports financial resources that are restricted, committed or assigned to expenditures for capital outlays including the land acquisition and/or construction of capital facilities and other capital assets. Capital projects are primarily non-recurring in nature. All capital categories require a unit cost threshold of greater than \$5,000, except roads, buildings, and computer software (recorded in the general fund) whose threshold is \$50,000. The CIP budget is 36.7% or \$33,268,114 of the consolidated budget and supports diversified projects throughout our Bluffton neighborhoods. Budget details are available in the attached Executive Consolidated Budget Summary.

Debt Service Fund accounts for the accumulation of resources for the payment of interest and principal on general long-term debt obligations. The primary source of revenue is property tax and bond proceeds. The Debt Service Fund budget is \$10,452,166 or 11.6% of the consolidated budget and supports the debt service for the 2014 and 2022 Tax Increment Revenue Bonds, 2020 General Obligation Bond for the Law Enforcement Center at Buckwalter Place, 2020A General Obligation Bond for Stormwater Capital Projects, a transfer to the Capital Improvement Program Fund for allowable projects, and future debt payments and allowable expenditures. Budget details are available in the attached Executive Consolidated Budget Summary.

NEXT STEPS:

FY2025 begins July 1, 2024.

ATTACHMENTS:

1. FY2025 Proposed Consolidated Budget Executive Summary
2. Ordinance for Fiscal Year 2025 Budget
 - Attachment A: General Fund Proposed Budget
 - Attachment B: Hospitality Tax Fund Proposed Budget
 - Attachment C: Local Accommodations Tax Fund Proposed Budget
 - Attachment D: Stormwater Fund Proposed Budget
 - Attachment E: Capital Improvement Program Fund Proposed Budget
 - Attachment F: Debt Service Fund Proposed Budget
 - Attachment G: Consolidated Proposed Budget
 - Attachment H: Master Fee Schedule

Town of Bluffton, South Carolina



PROPOSED CONSOLIDATED MUNICIPAL BUDGET

For the Fiscal Year Ended June 30, 2025



bluffton
HEART OF THE LOWCOUNTRY™

www.TownofBluffton.sc.gov



Town of Bluffton, South Carolina
Consolidated Municipal Budget
Fiscal Year
July 1, 2024 through June 30, 2025

Elected Officials

Mayor - The Honorable Larry Toomer

Council Members:

Mayor Pro Tempore – Dan Wood

Emily Burden

Bridgette Frazier

Fred Hamilton

Appointed Officials

Stephen Steese – Town Manager

Terry A. Finger – Town Attorney

Honorable Clifford Bush III, Chief Municipal Court Judge

Senior Management

Chris Forster

Heather Colin

Marcia Hunter

Joseph Babkiewicz

Anni Evans

Derrick Coaxum

Lisa Cunningham

Kevin Icard

Kim Jones

Natalie Majorkiewicz

David Nelems

Tracye Stormer

Assistant Town Manager

Assistant Town Manager

Town Clerk

Chief of Police

Director of Human Resources

Director of Public Services

Clerk of Court

Director of Growth Management

Director of Projects and Watershed Resilience

Director of Finance

CEO, Don Ryan Center for Innovation

Chief Technology Officer

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As citizens of Bluffton, South Carolina, we hold the following to be true:

That social, cultural and economic diversity and inclusiveness
are the essence of our community;

That we bear responsibility for the stewardship of nature's blessings
entrusted to us in Bluffton and along the May River;

That freedom and civic duty work hand-in-hand to create a culture of
individuality and a sense of community;

That our natural, physical and cultural history are worthy of our protection
as trustees in order for us to embrace our future.

Acknowledging these truths, we aspire to the following goals:

To build upon our historic foundation a future that celebrates diversity,
nurtures neighborliness and ensures a future of opportunity
for generations to come;

To enhance the natural beauty and the quality of
the May River and its watershed;

To protect the architectural heritage of Old Town Bluffton;

To enhance the canopy of trees and natural landscape
throughout Bluffton;

To engage the creative human spirit and the arts within Bluffton;

To protect and enhance the oyster, shrimping, and fishing opportunities
of the May River;

To provide housing opportunities for all citizens that are
decent, affordable, and Bluffton beautiful.

To nurture a respect for each citizen.

Strategic Plan Summary

A Mayor and Council Strategic Planning Workshop was held in November 2023. The workshop identified planning objectives and actions that provide policy guidance in managing and directing the application of Town resources into a list of Strategic Plan Focus Areas. These focus areas are designed to keep the organization's priorities from getting distracted by what may appear to be competing opportunities. This strategic focus will drive policy decisions and priorities for the town. The Town of Bluffton's Strategic Focus Areas are:

1. Affordable and/or Workforce Housing
2. Community Quality of Life
3. Economic Growth
4. Fiscal Sustainability
5. Infrastructure
6. May River and Surrounding Rivers and Watersheds, and
7. Town Organization

Bluffton's Vision Statement

*Bluffton, the Heart of the Lowcountry,
a Town that appreciates the past, focuses on today
and is planning together for a greater future.*

It reflects a welcoming and inclusive community, committed to retaining its historic nature, livable neighborhoods, active lifestyle and respect for the May River. Town Council and Town Staff are committed to work together to create a great community now and one that is also sustainable for the generations to come.

Bluffton's Mission Statement

*We take care of our citizens, the Town and each other
by continuously making our community and organization better.*

This statement reflects its commitment to people and processes by:

1. Providing excellent services by continuously looking for improvements in services using best practices.
2. Providing award winning fiscal management services to our citizens.
3. Providing exceptional customer service that is focused on solutions and meeting the needs of our citizens.
4. Providing meaningful public engagement opportunities for our community.
5. Providing a work environment committed to teamwork, communication, transparency, ethical behavior and progressive compensation to help employees reach their full potential.
6. Providing and using performance measures to determine if our services are getting the intended results.

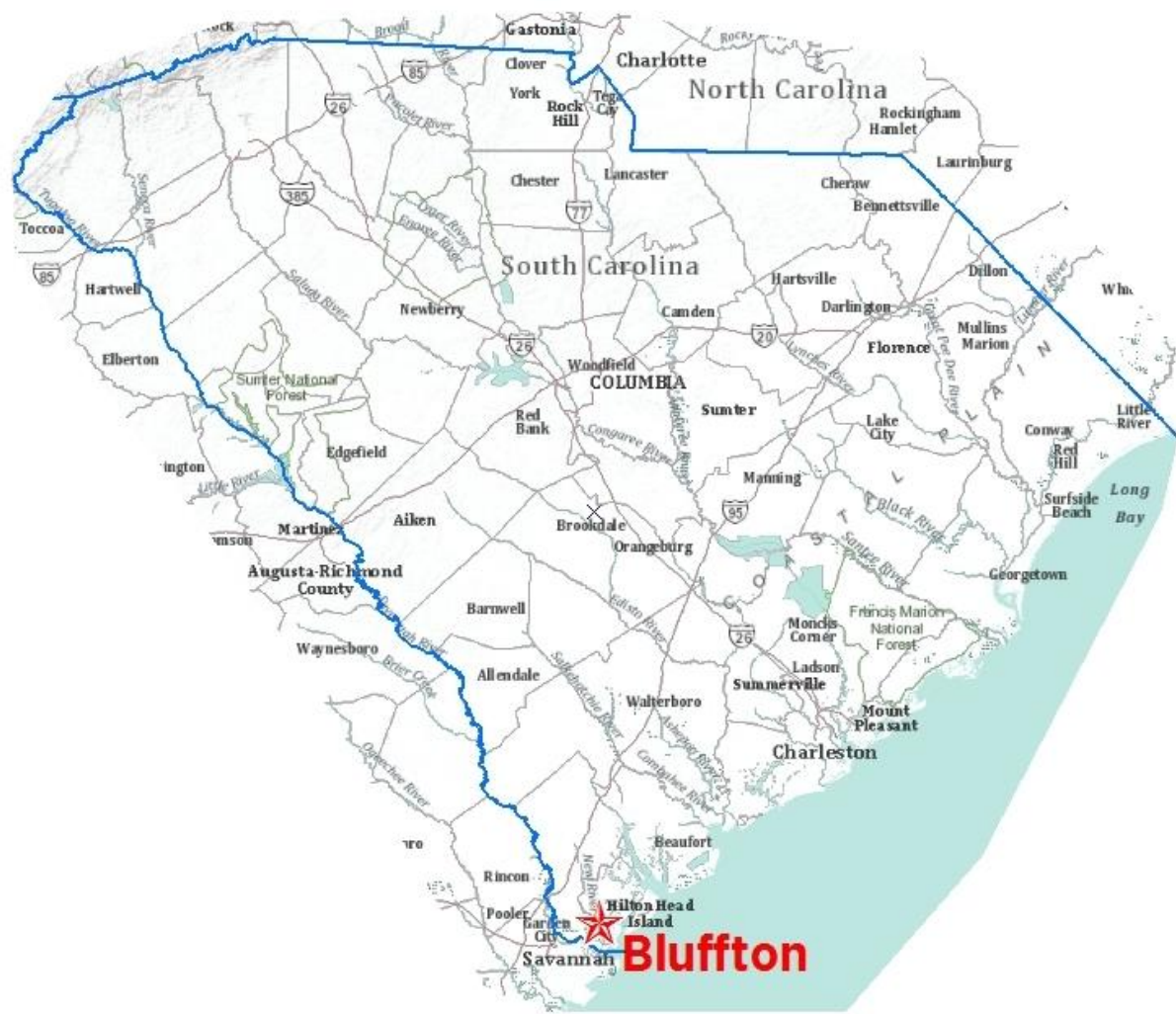
Why Does the Town Prepare a Budget?

1. Establishes priorities to determine how resources will be allocated among the Town's programs and services.
2. Identifies the costs of providing programs and services.
3. Establishes the amount of revenue projected to be available, and subsequently sets limitations on the amount of expenditures that can be supported.
4. Aligns allocated funding with Strategic Plan Action Agenda priorities established by Town Council.
5. Provides budgetary targets to compare with actual revenues and expenditures throughout the year.

The State of South Carolina requires Town Council to adopt an annual balanced budget ordinance prior to July 1. The Town's annual budget is developed in conjunction with feedback from citizens, various boards and commissions including the Town's Planning Commission, the Mayor and Council, the Town Manager, and each department within the Town. Town Council adopts the budget via two readings of the Consolidated Budget Ordinance as well as a public hearing. The first reading is held in May, and the second reading and associated public hearing is held in June. Town Council also holds two budget workshops to review projected revenues, expenditure requests, programs, services, and capital projects.

Area Map

The Town of Bluffton is located in Beaufort County, a southern coastal county in South Carolina. It is situated on a high bluff overlooking the May River, a pristine waterway that has strongly contributed to the Town's history, industry, and recreational opportunities. Bluffton is located just 12 miles west of Hilton Head Island, SC and roughly 20 miles northeast of Savannah, GA.



Town of Bluffton at a Glance

The Town of Bluffton, settled in 1825, was approximately one square mile when originally incorporated in 1852 as a summer coastal retreat. The town is rich with historical significance. The Calhoun Street Steamboat landing served as a stopover for travelers making their way between Savannah, Beaufort and Charleston. However, on June 4, 1863, Bluffton suffered devastation when Union troops carried out “The Burning of Bluffton” by setting fire to nearly everything in town, leaving only [two churches and 15 private residences](#). Prior to the Civil War, there were 60 brick and mortar buildings in the town. In 1996, the Bluffton Historic District was listed in the National Register of Historic Places. In 2007, the local Old Town Bluffton Historic District, covering the original one square mile of the town, was established by Town Council.

After a series of annexations, which began in 1987, the Town of Bluffton is now 54 square miles and has seen the population increase from 738 to over 32,000 today. While the population numbers still classify Bluffton as a small town, in terms of police and planning purposes, the town serves a daily population of 50,000 to 60,000 when tourists and visitors to the town are included.

Most of Bluffton’s 54 square miles is already master planned. Ninety-two percent (92%) of Bluffton is covered by development agreements, though it is only about 57% built-out. This means that the town must plan to continue to facilitate steady growth for the foreseeable future.

Recent Awards and Recognitions:

- **#1 “Safest City” in South Carolina** *Safety.com, December 2020*
- **#2 “Safest Places to Live in South Carolina”** *Money, Inc, August 2020*
- **#4 “Safest City” in South Carolina** *Safewise, May 2020*
- **#2 “Safest City” in South Carolina** *National Council for Home Safety & Security, March 2020 and SafeWise in 2022.*
- **#1 “Safest City” in South Carolina** *The Home Security Advisor, 2019*
- **#4 “Safest City” in South Carolina** *HomeSnacks, 2019*
- **#8 The South’s Best Small Towns** *Southern Living Magazine, April 2019*
- **Standard & Poor’s Rating** upgraded the Town of Bluffton bond rating to AA+, the second-highest rating for a municipality.
- **2018 Preserving Our Places in History award, The Garvin-Garvey House Rehabilitation Project** *South Carolina African American Heritage Commission, April 2019*
- **2019 Municipal Achievement Award 10,001-20,000 Two Streetscapes, One Historic District: Two Streetscape Projects Unify Bluffton’s Historic District Providing Walkability & Connectivity,** *Municipal Association of South Carolina (MASC), July 2019*
- **2020 Citation Award for Adaptive Reuse and Preservation, The Garvin-Garvey House Rehabilitation Project** *South Carolina chapter of the American Institute of Architects (ALASC), November 2020*

Town of Bluffton at a Glance (Continued)

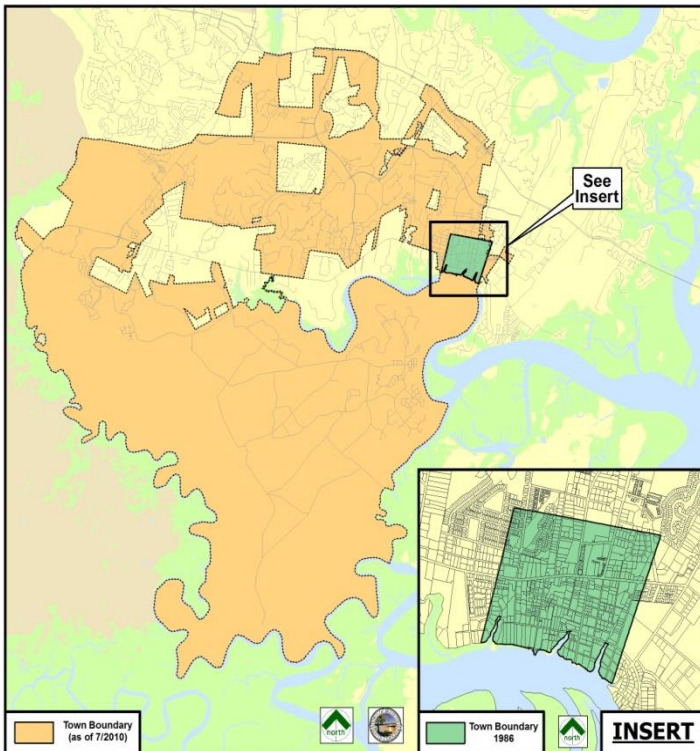
Recent Awards and Recognitions (continued):

- *2023 Municipal Award – Neighborhood Assistance Program*
- **2022 Municipal Achievement Award, Public Service Category** Mental Health & Wellness Program
- **2022 Excellence in Government Finance** *Government Finance Officers Association of the United States and Canada* the Town's Establishing a New Fund Balance and Capital Asset Reserve Policy
- **Distinguished Budget Presentation Award** *Government Finance Officers Association of the United States and Canada, every year since 2011. Received special recognition for the Town's long-range operating financial plans for FY2024.*
- **Certificate of Achievement for Excellence in Financial Reporting Award for the Comprehensive Annual Financial Report** *Government Finance Officers Association of the United States and Canada, every year since 2008.*
- **Award for Outstanding Achievement in Popular Annual Financial Reporting** *Government Finance Officers Association of the United States and Canada, every year since 2011.*
- **Triple Crown Winner** *Government Finance Officers Association of the United States and Canada, only 317 governments received the award in 2022.*

Bluffton is also home to Palmetto Bluff, a 19,271-acre world-renowned residential community and resort, which consistently receives top awards and accolades. Palmetto Bluff celebrated its grand debut of Montage Palmetto Bluff in August 2016. Montage Palmetto Bluff is AAA 5-diamond resort with 200 rooms, 6 dining locations, 13,000 square foot spa, and many other resort amenities. Below is a list of awards and accolades for this award-winning resort:

- **Five Diamond Hotel** *AAA Five-Diamond Awards, 2023*
- **Four Diamond Restaurant, River House** *AAA Five-Diamond Awards, 2023*
- **Most Luxurious Accommodations North America** *AAA Five-Diamond Awards, 2021, 2017, 2016, 2015, 2014, 2013 and 2012*
- **Five Star Hotel** *Forbes Five-Star Awards, 2023*
- **Five Star Spa** *Forbes Five-Star Awards, 2023*
- **Best Golf Resorts in The Carolinas** *Golf Digest, Editors' Choice Best Resorts | The Americas, 2022 and 2017*
- **The Best New Hotels in the World** *Travel & Leisure, World's Best Awards, 2019 and 2017*
- **The Best Hotels and Resorts in the U.S. and Canada** *Conde Nast Traveler Gold List, 2022 and 2020*
- **Best Hotels in the USA** *U.S. News and World Report, 2023, 2021, 2020 and 2018*
- **#1 Top 20 Resorts in the South** *Conde Nast Traveler Readers' Choice Awards, 2022*
- **#10 Top 20 Best Resorts in the World, USA** *Conde Nast Traveler Readers' Choice Awards, 2022*
- **Top 10 South Carolina Resort Hotels** *Travel & Leisure, World's Best Awards, 2022, 2021, 2020, and 2017*

Town of Bluffton at a Glance (Continued)



Bluffton expanded its territory by more than 32,000 acres primarily through annexation of four tracts of undeveloped land (Palmetto Bluff, Shults tract, Buckwalter tract, and Jones tract). Coupled with the Buck Island/Simmonsville area annexation and several auxiliary annexations (Bluffton Village, Village at Verdier, Shultz-Goethe Road Area, and Willow Run). ***The Town of Bluffton is now approximately 54 square miles in area, becoming the fifth largest town in South Carolina by land area.*** These annexations have created a challenge for government officials and citizens to preserve the Town's rich historical heritage, high quality of life, and unique coastal culture.

Government Profile

The Town operates under the council-manager form of government. Policy-making and legislative authority are vested in a governing council (Council) consisting of a mayor and four (4) other members. Members of Council are elected for a term of four (4) years. Council is primarily responsible for setting policies, passing ordinances, adopting the budget, appointing committees, and hiring the Town's manager, municipal judges, and attorney. The Town Manager, acting as chief executive officer, carries out the policies and ordinances of the Council, oversees the day-to-day operations of the Town, appoints the heads of various departments, and manages Town staff members.

The Town is empowered to levy a property tax on both real and personal property located within its boundaries. The Town also has the power by statute to extend its corporate limits by voluntary annexation as deemed appropriate by Council.

Town of Bluffton at a Glance (Continued)

Local Economy

The Town has responded to its anticipated growth by collecting fees from developers to shield existing residents from the costs associated with growth. The budgeted amount for FY 2025 is \$342,761.

In 2005, the Town began construction of the May River Technical Park (Tech Park) in Buckwalter Place. The vision was to have an integrated mixed-use, technology-based business center near the intersections of the new Bluffton and Buckwalter Parkways for easy access both from its residents and visitors.

In June of 2006, the Town entered into a building construction and operating agreement with eviCore National (the nation's leading health insurance benefits organization) for the construction of an office building containing up to 49,000 square feet in the Tech Park, allowing eviCore to expand its presence in South Carolina. eviCore, a medical diagnostic imaging company, is a provider of healthcare specialty benefits management solutions to America's health plans. The construction of this building and the Tech Park project was completed in June of 2008. In 2010, construction of a second two-story building, serving as National Headquarters for eviCore and encompassing approximately 35,000 additional square feet, was completed. To date, more than 500 jobs have been created.



In November of 2015, Town of Bluffton Mayor Lisa Sulka announced the signing of a public-private partnership agreement between the Town of Bluffton, the Bluffton Public Development Corporation, and Southeastern Development Associates (formerly known as Blanchard and Calhoun Commercial) that will further develop Buckwalter Place Commerce Park (previously Tech Park). The agreement provides for continued public infrastructure investment supportive of this multi-county commerce park.

Town of Bluffton at a Glance (Continued)

Local Economy (continued)

The Town, along with Beaufort County and Jasper County, have formed a multi-county industrial park and entered into a public-private development contract with plans to develop a multi-use property, including a Kroger grocery store as the anchor surrounded by general commercial, retail and office space, and a culinary institute.



In September of 2023, the Town amended its Ordinance to establish an economic development incentives program to attract certain high demand services and commercial needs of the Town. In February of 2024, the Town awarded its first economic development agreement with Solomon Property Holdings SC, LLC that intends to invest an estimated \$10,800,000 for a 15,000 square foot health and wellness facility that is expected to employ 67 full-time positions.

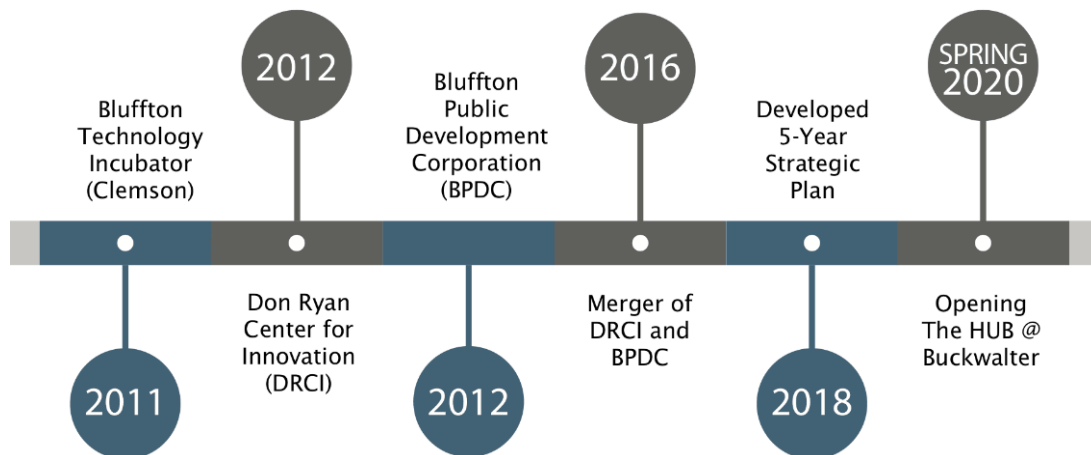
The Don Ryan Center for Innovation (DRCI) was established in mid-2012 as a 501(c)(3). The corporation's mission is to function as a business incubator to grow Bluffton's and the surrounding region's economic base by helping innovative start-up or early-stage companies. The organization expanded into partnerships with Beaufort County Schools, USCB, TCL, SCAD and the City of Beaufort to promote and support innovation and entrepreneurship for the purposes of economic development.



The Bluffton Public Development Corporation (BPDC) was established as a 501(c)(3) in late 2012 by Town leaders to pursue economic development within the Town. The corporation's mission is to accept, buy, sell, develop, mortgage, and transfer real and personal property including development rights. Its two other objectives are to assist in the town's economic development and undertake activities designed to promote and support the May River and other watershed cleanup efforts of the town.

Town of Bluffton at a Glance (Continued)

Local Economy (continued)



Both organizations have matured and evolved to reflect the needs of the Town and the region. Since both work in the realm of economic development, Town Council has authorized the merger of these entities by adoption of a resolution on December 13, 2016 into a single entity known as the Don Ryan Center for Innovation, Inc. Contact Don Ryan Center for Innovation <https://www.donryancenter.com> to discover how we can help you make a difference.

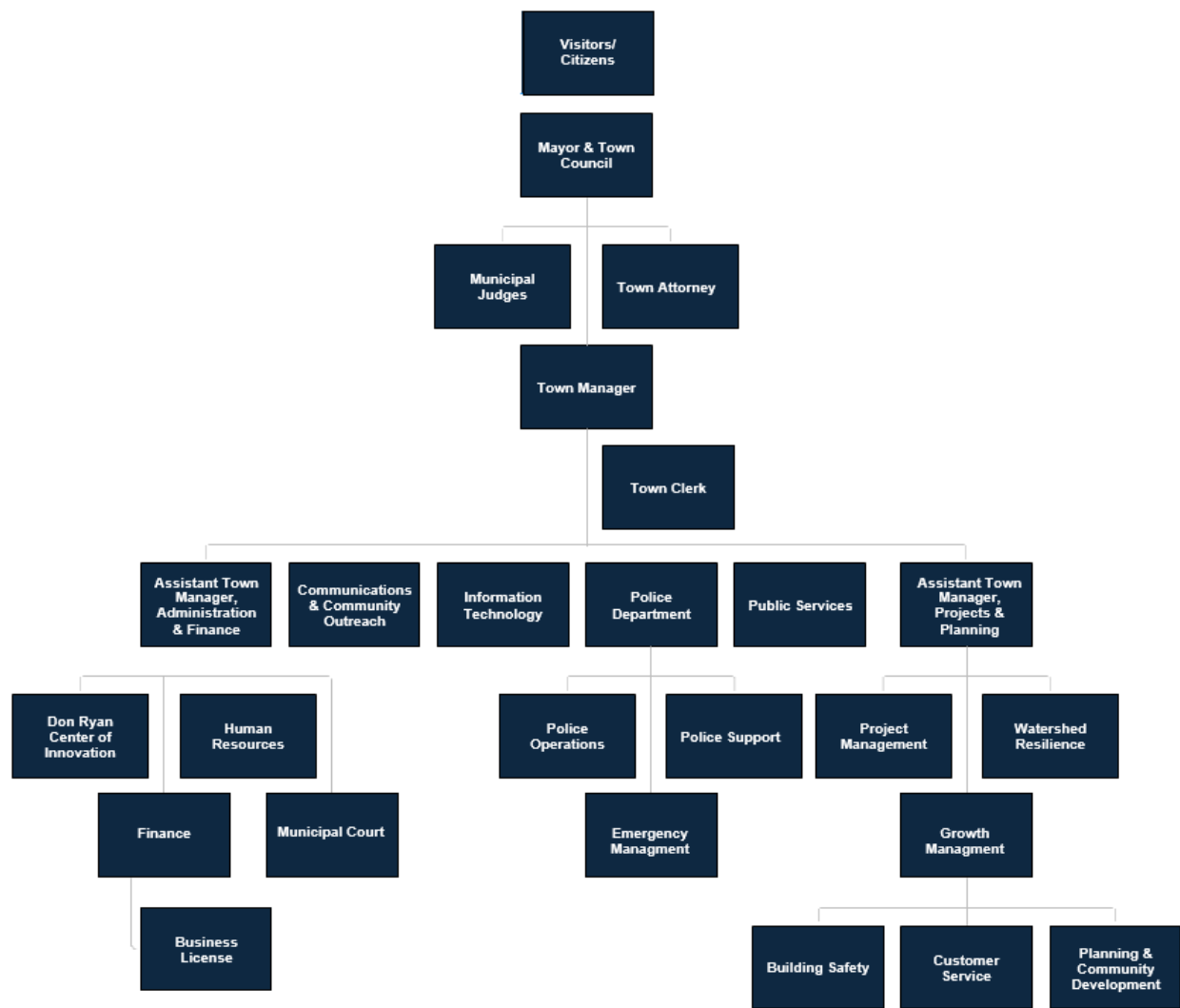
In FY2020, the DRCI moved into, “The Hub,” to serve as a catalyst for creativity, focus, and connection. More than just a place to work, this is a place to find community. Good things happen when people innovate together. The HUB at Buckwalter Place Commerce Park is the premier, knowledge-based center for innovation and economic development in Beaufort County.



This groundbreaking facility is much more than a building, but an innovation in regional economic development offering:

1. Business Incubation
2. Business Retention
3. Business Expansion
4. Business Recruitment
5. Workforce & Entrepreneurism Partnerships

Organizational Chart



Budget Highlights

The proposed budget, totaling \$90,620,863, keeps the Town healthy financially while still moving forward through program enhancements and a robust capital projects schedule with realistic revenue projections and an operating budget that advances key initiatives.

- ✓ Exceeds all essential levels of fund balance reserves for a healthy financial position
- ✓ Aaa Bond Rating – Moody's and AA+ Bond Rating – Standard and Poor's
- ✓ Capital Projects Diversified Throughout Bluffton Neighborhoods
- ✓ May River Watershed Action Plan and Municipal Separate Storm Sewer System (MS4) Program Implementation
- ✓ Supports existing Community Policing, Planning and Community Development, Economic Development, and Other Programs
- ✓ Includes 2% cost of living, classification and compensation adjustment, and 2% midyear merit increase for employees
- ✓ Supports staffing changes described on page 20
- ✓ Includes Health Benefit cost increase

The Council priority programs for FY2025 include Affordable Housing, through a committee formed in FY2020 and is funded in the amount of \$400,000 in the General Fund to assist income-qualified residents with minor home repairs, as well as property maintenance, to include abatement of unsafe structures, property clean-up and septic repair, and dangerous tree removal. In the Capital Improvement Project Fund, there is \$1,478,480 budgeted to assist in the development of workforce and/or affordable housing.

Other initiatives include funding for the Historic Preservation Program, enhanced employee programs that include a cost of living, classification and compensation adjustment, and mid-year merit increases, health and wellness opportunities, community and civic outreach through increased events, and a robust police retention and recruitment program.

The adopted budget invests in civic space, Town facilities, and environmental initiatives. Just over \$33 million of capital projects are in the FY2025 proposed budget. These projects include significant investment planned in public infrastructure in parks improvements with the largest at the New Riverside Barn Park with the assistance of the 2022 TIF Bond. Additionally, multiple projects are planned with a focus on sewer and watershed protection.

Property Tax Overview

Estimated 2024 Beaufort County Tax Bill for Average Bluffton Home Appraised Value

Home Appraised Value	\$	390,500	\$	390,500
Resident Assessed Value		4%		6%

610 Town of Bluffton	Millage	Property Tax & Fees	Property Tax & Fees
County Operations	42.3	\$ 660.73	\$ 991.09
Capital Improvement (NEW)	2.4	37.49	56.23
Solid Waste & Recycling (NEW)	3.7	57.79	86.69
Higher Education USCB/TCL (NEW)	2.2	34.36	51.55
Indigent Care Bft Memorial Hosp (NEW)	0.4	6.25	9.37
Indigent Care Bft/Jasper Comp (NEW)	0.4	6.25	9.37
Ecomonic Development (NEW)	0.3	4.69	7.03
County Debt	3.4	53.11	79.66
County Purchase Prop	4.4	68.73	103.09
*School Operations	121.8	-	2,853.77
School Debt	36.3	567.01	850.51
Bluffton Fire District	26	406.12	609.18
Town of Bluffton Operations	34.3	535.77	803.65
Town of Bluffton Debt	1.7	26.55	39.83
Stormwater (SW) Municipal District Fee		115.00	115.00
Stormwater (SW) County Fee		4.49	4.49
Total	279.6	\$ 2,584.33	\$ 6,670.52

*School Operations applicable to nonresidents and commercial taxpayers.

\$390,200 averaged appraised home value from Census.gov quickfacts.

FY 2025 Consolidated Budget Summary

FY 2025 Proposed Consolidated Budget by Fund



Fund	FY 2024 Revised Budget	FY 2025 Proposed Budget	% Change	% of Budget
General Fund	\$ 31,708,283	\$ 32,468,440	2.4%	35.8%
Hospitality Tax Fund	8,492,952	8,248,866	-2.9%	9.1%
Local Accommodations Tax Fund	3,298,298	2,165,606	-34.3%	2.4%
Stormwater Fund	3,386,019	4,017,671	18.7%	4.4%
Capital Improvement Program Fund	37,637,638	33,268,114	-11.6%	36.7%
Debt Service Fund	7,903,224	10,452,166	32.3%	11.6%
Total Consolidated Budget	\$ 92,426,414	\$ 90,620,863	-2.0%	100.0%

Fund Types

General Fund

The Town’s primary operating fund and is used to account for all Town financial resources except those to be accounted for in another fund. Principal sources of revenue are property taxes and licenses and permit fees.

Hospitality Tax Fund

Accounts for the local hospitality taxes collected by the Town for use in tourism-related expenditures and related Capital Improvements Projects. The tax is equal to two percent (2%) on the gross sales of prepared meals and beverages.

Local Accommodations Tax Fund

Accounts for the local accommodation taxes collected by the Town for use in tourism-related expenditures and related Capital Improvements Projects. The tax is equal to three percent (3%) on the gross proceeds derived from the rental or charges for sleeping accommodations.

Fund Types (Continued)

Stormwater Fund

Accounts for and reports the financial resources of all stormwater-related expenditures including routine maintenance and capital projects. The primary source of revenue is stormwater utility fees and state and federal grants.

Capital Improvements Program (CIP) Fund

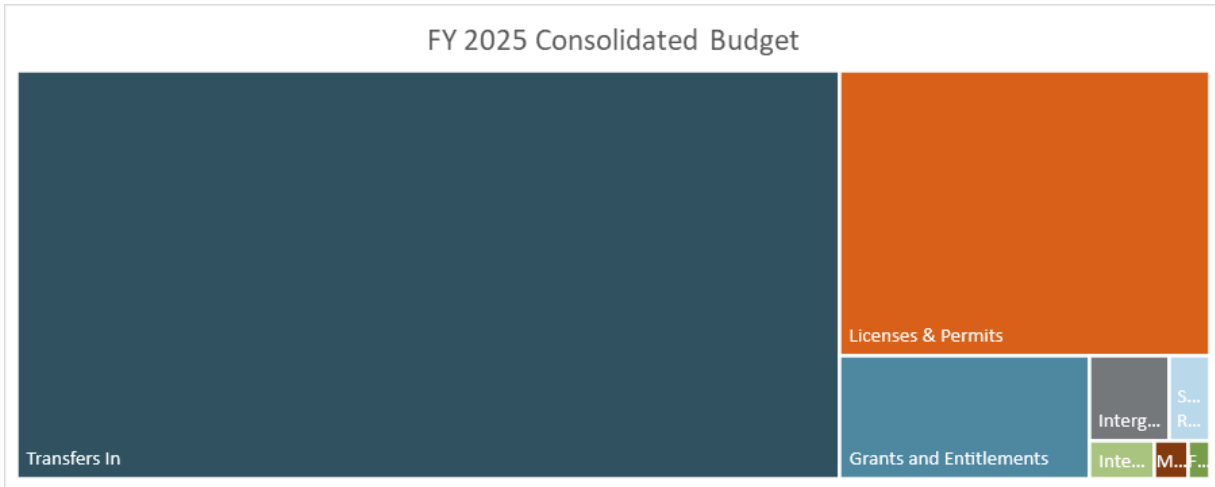
Accounts for and reports financial resources that are restricted, committed or assigned to expenditures for capital outlays including the acquisition or construction of capital facilities and other capital assets. In addition to funding with bond proceeds and intergovernmental revenue such as state and federal grants, hospitality tax fees fund tourism-related projects. Capital Projects are primarily non-recurring in nature. All capital categories require a cost threshold of greater than \$5,000 except for roads, buildings and computer software (recorded in general fund) with a threshold of greater than \$50,000.

Debt Service Fund

Accounts for the accumulation of resources for the payment of interest and principal on general long-term debt obligations. The primary source of revenue is property tax and bond proceeds.

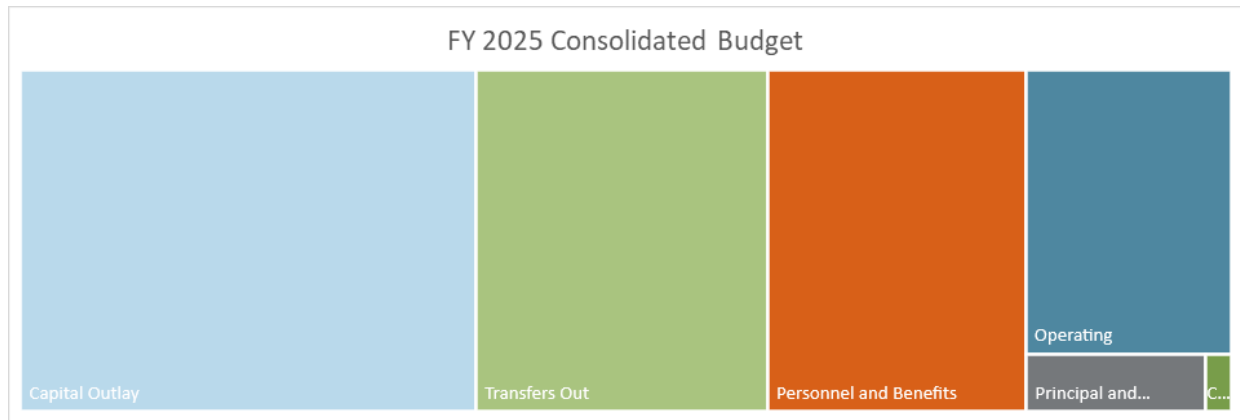
Where Our Funding Comes From

Consolidated Revenue Budget



	FY 2024		FY 2025		\$	%
Revenues	Revised Budget	% of Budget	Proposed Budget	% of Budget	Budget Change	Budget Change
Property Taxes	\$ 12,873,486	13.9%	\$ 15,159,600	16.7%	\$ 2,286,114	17.8%
Local Hospitality & Accommodations Taxes	5,372,036	5.8%	5,458,677	6.0%	86,641	1.6%
Licenses & Permits	15,490,934	16.8%	15,202,659	16.8%	(288,275)	-1.9%
Grants and Entitlements	2,239,292	2.4%	4,418,456	5.0%	2,179,164	97.3%
Intergovernmental	2,444,099	2.6%	961,608	1.1%	(1,482,491)	-60.7%
Service Revenues	811,680	0.9%	492,860	0.5%	(318,820)	-39.3%
Fines & Fees	115,000	0.1%	115,000	0.1%	-	0.0%
Interest Income	42,900	0.1%	350,000	0.4%	307,100	715.9%
Miscellaneous Revenues	120,000	0.1%	185,915	0.1%	65,915	54.9%
Sub-Total Revenues	39,509,427	42.7%	42,344,774	46.7%	2,835,347	7.2%
Transfers In	52,916,987	57.3%	48,276,088	53.3%	(4,640,899)	-8.8%
Sub-Total Other Financing Sources	52,916,987	57.3%	48,276,088	53.3%	(4,640,899)	-8.8%
Total Consolidated Revenues	\$ 92,426,414	100.0%	\$ 90,620,863	100.0%	\$ (1,805,552)	-2.0%

Where Our Resources Go



Expenditures	FY 2024 Revised Budget	% of Budget	FY 2025 Proposed Budget	% of Budget	\$ Budget Change	% Budget Change
Personnel and Benefits	\$ 17,976,186	19.5%	\$ 19,351,926	21.4%	\$ 1,375,740	7.7%
Operating	10,198,648	11.0%	12,764,985	14.1%	2,566,337	25.2%
Principal and Interest	2,374,041	2.6%	2,268,058	2.5%	(105,983)	-4.5%
Capital Outlay	1,012,217	1.1%	1,127,940	1.2%	115,723	11.4%
Economic Development Projects	3,504,420	3.8%	3,204,420	3.6%	(300,000)	-8.6%
Facilities Projects	2,480,861	2.7%	2,531,432	2.8%	50,571	2.0%
Housing Projects	1,676,044	1.8%	1,478,480	1.6%	(197,564)	-11.8%
Information Technology Infrastructure Projects	208,471	0.2%	436,000	0.5%	227,529	109.1%
Land Acquisition	4,993,220	5.4%	2,959,387	3.3%	(2,033,833)	-40.7%
Park Projects	11,530,565	12.5%	11,551,150	12.7%	20,585	0.2%
Road Projects	3,475,572	3.8%	3,370,513	3.7%	(105,059)	-3.0%
Stormwater and Sewer Projects	9,190,625	9.9%	7,419,732	8.2%	(1,770,893)	-19.3%
Sub-Total Expenditures	68,620,870	74.3%	68,464,023	75.6%	(156,847)	-0.2%
Contribution to Fund Balance	578,791	0.6%	317,000	0.3%	(261,791)	-45.2%
Transfers Out	23,226,753	25.1%	21,839,840	24.1%	(1,386,913)	-6.0%
Sub-Total Other Financing Uses	23,805,544	25.7%	22,156,840	24.4%	(1,648,704)	-6.9%
Total Consolidated Expenditures	\$ 92,426,414	100.0%	\$ 90,620,863	100.0%	\$ (1,805,551)	-2.0%

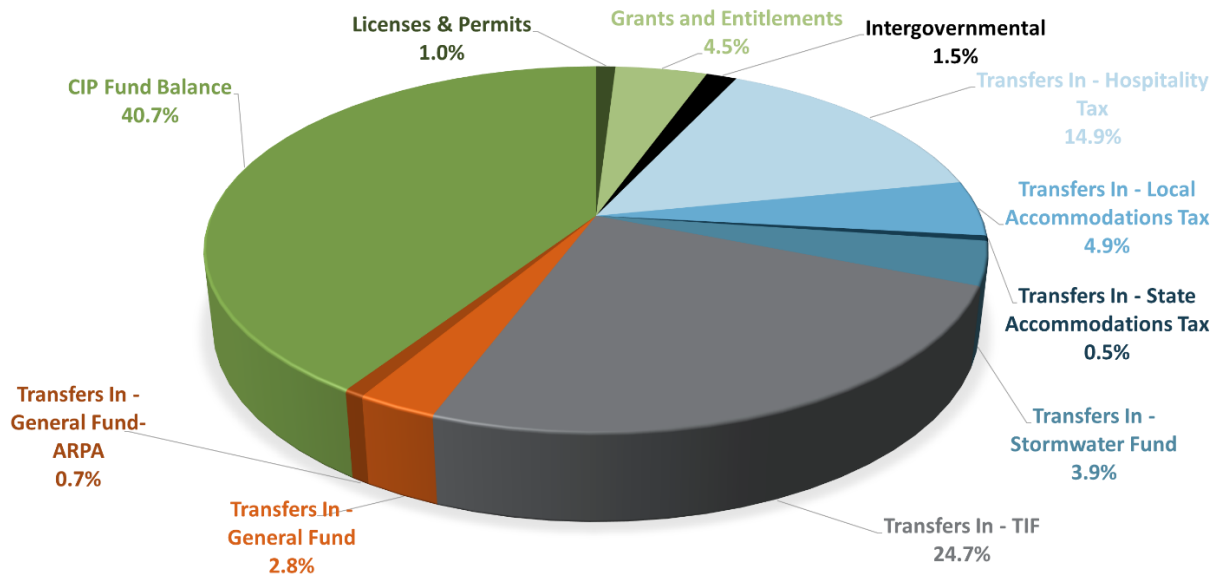
Town Workforce

Personnel by Department and Division	FY 2024 Budget		FY 2025 Budget		Change	
	Full Time	Part Time	Full Time	Part Time	Full Time	Part Time
Communications & Community Outreach	3.0	1.0	4.0	2.0	1.0	1.0
Economic Development (DRCI)	3.0	-	3.0	-	-	-
Executive Office	6.5	1.0	8.5	1.0	2.0	-
Finance & Administration	9.5	-	8.5	-	(1.0)	-
Growth Management Department						
Building Safety Division	8.0	-	8.0	-	-	-
Customer Service Division	3.5	-	3.5	-	-	-
Planning & Community Development Division	8.0	-	8.0	-	-	-
Human Resources	3.0	-	3.0	-	-	-
Information Technology	7.5	-	7.5	-	-	-
Municipal Court	3.0	-	3.0	-	-	-
Police Department						
Civilian Positions	10.0	9.0	11.0	10.0	1.0	1.0
Sworn Positions by Rank	65.0	-	65.0	-	-	-
Projects & Watershed Resilience Department						
Project Management Division	7.0	1.0	6.0	-	(1.0)	(1.0)
Watershed Management Division (SWU Fund)	8.0	-	9.0	-	1.0	-
Public Services	13.0	-	16.0	-	3.0	-
Total Personnel	158.0	12.0	164.0	13.0	6.0	1.0

Position Changes:

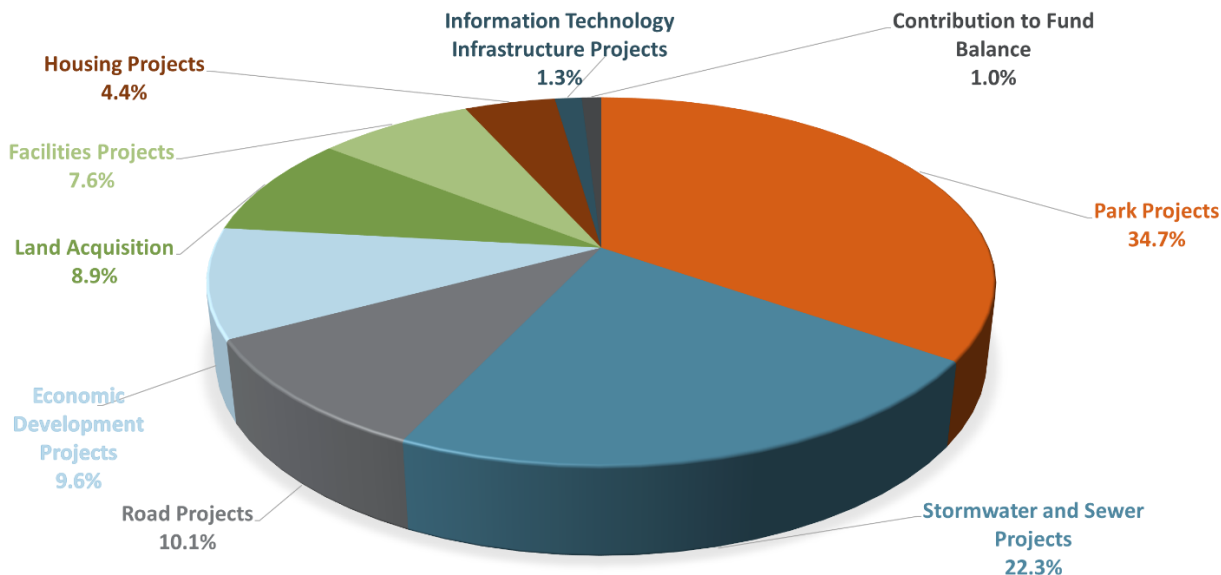
- Communications & Community Outreach
 - Addition of fulltime Welcome Center Coordinator
 - Addition of parttime Welcome Center Coordinator
- Executive Office
 - Special Projects Manager from Project Management
 - Property Acquisition Administrator from Project Management
 - Add Assistant Town Clerk position
 - Remove parttime Administrative Assistant position
- Finance & Administration
 - Remove fulltime Accountant for backfill Accounting Manager position
- Police
 - Add fulltime Community Relations Manager
 - Add one (1) new School Crossing Guard position
- Projects & Watershed Resilience, Project Management Division
 - Move fulltime Special Projects Manager to Executive
 - Move parttime Property Acquisition Administrator to Executive
 - Add fulltime Stormwater Inspector position
- Public Services
 - Addition of three (3) Public Services Worker positions

Capital Improvement Program (CIP) Fund



Funding Sources	FY 2025	
	Proposed Budget	% of Budget
Licenses & Permits	\$ 317,000	1.0%
Grants and Entitlements	1,506,543	4.5%
Intergovernmental	500,000	1.5%
Transfers In - Hospitality Tax	4,943,305	14.9%
Transfers In - Local Accommodations Tax	1,629,547	4.9%
Transfers In - State Accommodations Tax	152,941	0.5%
Transfers In - Stormwater Fund	1,281,034	3.8%
Transfers In - TIF	8,206,402	24.7%
Transfers In - General Fund	941,000	2.8%
Transfers In - General Fund-ARPA	241,207	0.7%
CIP Fund Balance	13,549,135	40.7%
Total CIP Funding Sources	\$ 33,268,114	100.0%

Capital Improvement Program (CIP) Fund (Cont.)



Project Expenditures	FY 2025	% of
	Proposed Budget	
Economic Development Projects	\$ 3,204,420	9.6%
Facilities Projects	2,531,432	7.6%
Housing Projects	1,478,480	4.4%
Information Technology Infrastructure Projects	436,000	1.3%
Land Acquisition	2,959,387	9.0%
Park Projects	11,551,150	34.7%
Road Projects	3,370,513	10.1%
Stormwater and Sewer Projects	7,419,732	22.3%
Contribution to Fund Balance	317,000	1.0%
Total CIP Expenditures	<u>\$ 33,268,114</u>	<u>100.0%</u>

Expenditure Budget by Fund

FY 2025 Proposed Budget

General Fund Budget	Salaries & Benefits	Operating	Capital Outlay	Debt	Total
Total General Fund Expenditures	\$ 18,330,546	\$ 11,827,747	\$ 1,127,940	\$ -	\$ 31,286,233
Contribution to Fund Balance					-
Transfer to Capital Improvements Program Fund					1,182,207
Total General Fund Budget					\$ 32,468,440

Hospitality Tax Fund Budget	Salaries & Benefits	Operating	Capital Outlay	Debt	Total
Transfer to General Fund	\$ -	\$ -	\$ -	\$ -	\$ 4,943,305
Transfer to Capital Improvements Program Fund					3,305,561
Total Stormwater Fund Budget					\$ 8,248,866

Local Accommodations Tax Fund Budget	Salaries & Benefits	Operating	Capital Outlay	Debt	Total
Transfer to General Fund	\$ -	\$ -	\$ -	\$ -	\$ 1,629,547
Transfer to Capital Improvements Program Fund					536,059
Total Stormwater Fund Budget					\$ 2,165,606

Stormwater Fund Budget	Salaries & Benefits	Operating	Capital Outlay	Debt	Total
Watershed Management Expenditures	\$ 1,021,380	\$ 937,188	\$ -	\$ 22,344	\$ 1,980,912
Transfer to General Fund					459,675
Transfer to Debt Service					296,050
Transfer to Capital Improvements Program Fund					1,281,034
Total Stormwater Fund Budget					\$ 4,017,671

Capital Improvements Program Fund Budget	Capital Outlay	Total
Park Projects	\$ 11,551,150	\$ 11,551,150
Stormwater and Sewer Projects	7,419,732	7,419,732
Road Projects	3,204,420	3,204,420
Economic Development Projects	3,370,513	3,370,513
Land Acquisition	2,959,387	2,959,387
Facilities Projects	2,531,432	2,531,432
Housing Projects	1,478,480	1,478,480
Information Technology Infrastructure Projects	436,000	436,000
Contribution to Fund Balance	317,000	317,000
Total Capital Improvements Program Fund Budget		\$ 33,268,114

Debt Service Fund Budget	Operating	Principal	Interest	Total
Series 2014 TIF Bond	\$ -	\$ 896,386	\$ 35,295	\$ 931,681
Series 2022 TIF Bond		327,553	313,380	640,933
Series 2020 GO Bond - LEC		255,000	122,050	377,050
Series 2020A GO Bond - SWU Projects		165,000	131,050	296,050
Miscellaneous Expenditures	50			50
Transfer to Capital Improvements Program Fund				8,206,402
Total Debt Service Fund Budget				\$ 10,452,166

Budget Summary by Fund

Governmental funds are used to account for all or most of a government's general activities. The Town of Bluffton adopts a budget for six major funds: General Fund, Hospitality Tax Fund, Local Accommodations Tax Fund, Stormwater Fund, Capital Improvement Program (CIP) Fund, and the Debt Service Fund.

The General Fund is the Town's primary operating fund and is used to account for all Town financial resources except those to be accounted for in another fund. Principal sources of revenue are property taxes and licenses and permit fees.

The Hospitality Tax Fund accounts for the local hospitality taxes collected by the Town for use in tourism-related expenditures and related Capital Projects. The source of revenue is equal to two percent (2%) on the gross sales of prepared meals and beverages.

The Local Accommodations Tax Fund accounts for the local accommodations taxes collected by the Town for use in tourism-related expenditures and related Capital Projects. The source of revenue is equal to three percent (3%) on the gross proceeds derived from the rental or charges for sleeping accommodations.

The Stormwater Fund accounts for and reports the financial resources of all stormwater-related expenditures including routine maintenance and capital projects. The primary source of revenue is stormwater utility fees and state and federal grants.

The Capital Improvements Program (CIP) Fund accounts for and reports financial resources that are restricted, committed, or assigned to expenditure for capital outlays including the acquisition or construction of capital facilities and other capital assets. In addition to funding with bond proceeds and intergovernmental revenue such as state and federal grants, hospitality tax fees fund tourism-related projects. Capital Projects are primarily non-recurring in nature. All capital categories require a unit cost greater than \$5,000 for all categories except roads, building (and computer software recorded in the general fund) whose threshold is \$50,000. Donated capital assets are recorded at estimated market value. The cost of normal maintenance and repairs that do not add to the value of the asset or materially extend the assets' lives are not capitalized and are recorded within the general fund.

The Debt Service Fund accounts for the accumulation of resources for the payment of interest and principal on general long-term debt obligations. The primary source of revenue is property taxes.



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**AN ORDINANCE OF THE TOWN OF BLUFFTON
ORDINANCE NO. 2024-
FISCAL YEAR 2025 BUDGET**

TO PROVIDE FOR THE LEVY OF TAX FOR THE TOWN OF BLUFFTON FOR THE FISCAL YEAR BEGINNING JULY 1, 2024 AND ENDING JUNE 30, 2025; TO PROVIDE FOR EXECUTION OF AND TO PUT INTO EFFECT THE CONSOLIDATED BUDGET; AND TO PROVIDE BUDGETARY CONTROL OF THE TOWN'S FISCAL AFFAIRS.

BE IT ORDERED AND ORDAINED BY THE MAYOR AND COUNCIL OF THE TOWN OF BLUFFTON, SOUTH CAROLINA:

SECTION 1. APPROPRIATION.

Funds are hereby appropriated as shown in the Consolidated Budget, the documents attached hereto and incorporated for reference as Attachments A, B, C, D, E, F and G establishing a Consolidated Budget of \$90,620,863 consisting of the General Fund of \$32,468,440; the Hospitality Tax Fund of \$8,248,866; the Local Accommodations Tax Fund of \$2,165,606; the Stormwater Fund of \$4,017,671; the Capital Improvements Program Fund of \$33,268,114; and the Debt Service Fund of \$10,452,166.

SECTION 2. ESTABLISHMENT OF PROPERTY TAX LEVY.

A tax to cover the period from July 1, 2024, through June 30, 2025, inclusive, for the sums and in the manner hereinafter mentioned, is and shall be levied, collected, and paid into the Treasury of the Town of Bluffton for its uses at a rate of mills on assessed value of real estate and personal property of every description in the Town of Bluffton, except such property as is exempt from taxation under the United States Constitution and laws of the State of South Carolina. Said tax levy shall be collected by Beaufort County Treasurer and paid into the County Treasury for the credit of the Town of Bluffton for its corporate purposes a general fund levy of 34.3 mills and a debt service fund levy of 1.7 mills for at a total levy of 36.0 mills. However, Council reserves the right to modify these millage rates at its August 13, 2024 Council meeting.

SECTION 3. ESTABLISHMENT OF A MASTER FEE SCHEDULE.

A Master Fee Schedule listing all fees charged by the Town for Fiscal Year 2025 is included and incorporated for reference as Attachment H.

SECTION 4. OUTSTANDING BALANCE APPROPRIATION AND ENCUMBRANCES.

The unobligated balance remaining from the prior fiscal year hereby remains in the fund and will be available for Fiscal Year 2025 appropriations.

Fiscal Year 2024 encumbrances of the Fund Balance will be provided for through a subsequent amendment of this budget ordinance to increase the funds from previous years and increase the appropriated budget expenditures.

SECTION 5. TRANSFER OF FUNDS AND AMENDMENTS.

The Town Manager or his designee is authorized to transfer any sum from one budget line item to another or from one department or division to another provided that no such transfer be made from one fund to another fund, conflict with any existing Bond Ordinance, or conflict with any previously adopted policy of Council. Changes or amendments that alter the total expenditures of any fund must be approved by Council.

SECTION 6. CONTRACTS.

The Town Manager or his designee is authorized to execute contracts on behalf of the Town within budgeted amounts. Contract amounts greater than that budgeted shall be subject to Council approval. All contracts greater than \$100,000 shall be subject to Council approval.

SECTION 7. RATE OF EXPENDITURES.

The Town Manager shall control the rate of expenditures within the Consolidated Budget so as not to exceed the amount of funds on hand. Any proposed tax and/or revenue anticipation notes shall be subject to specific Council approval prior to issuance.

SECTION 8. RESERVE FUNDS.

The following Designated Reserve Funds are established and fully funded:

Emergency Recovery Fund – This reserve shall be funded at an amount equal to or greater than fifteen (15) percent of the current fiscal year consolidated expenditure budget. For Fiscal Year 2025, this amount is established at \$10,269,604.

Capital Asset Reserve Fund – This reserve shall be funded annually by 50% of the total annual depreciation expense up to a maximum total reserve of the most recent five years of depreciation. For Fiscal Year 2025, the estimated contribution is \$666,992.

SECTION 9. COMPENSATION OF COUNCILMEMBERS

The mayor and councilmembers shall receive an annual compensation increase. The mayor compensation will increase from \$16,500 to \$25,000 and councilmember compensation will increase from \$11,000 to \$17,000. The last increase in compensation took effect in Fiscal Year 2022.

Pursuant to S.C. Code 1976, 5-7-170, this compensation change shall not go into effect until the commencement date of the terms of two or more members of town council elected at the next general election following the adoption of this section.

Participation in the retirement and health insurance plans remain the same.

SECTION 10. SEVERABILITY.

Should any section, phrase, sentence, or portion of this Ordinance be found invalid by a court or competent jurisdiction, such finding shall not invalidate the remaining portions of this Ordinance.

SECTION 11. EFFECTIVE DATE.

This Ordinance shall be effective on July 1, 2024.

PASSED, APPROVED, AND ADOPTED BY THE COUNCIL FOR THE TOWN OF BLUFFTON ON THIS _____ DAY OF _____, 2024.

Larry Toomer, Mayor

ATTEST:

Marcia Hunter, Town Clerk

Attachments:

- A. General Fund Budget
- B. Hospitality Tax Fund Budget
- C. Local Accommodations Tax Fund Budget
- D. Stormwater Fund Budget
- E. Capital Improvement Program Fund Budget
- F. Debt Service Fund Budget
- G. Consolidated Budget
- H. Master Fee Schedule

First Reading: May 14, 2024

Public Hearing and Second and Final Reading: June 11, 2024



**Town of Bluffton
General Fund Budget**

Attach

Section VIII. Item #1.

	Revised FY 2024 Budget	Proposed FY 2025 Budget	\$ Budget Change	% of Budget Change
Revenues				
Property Taxes	\$ 9,292,646	\$ 10,017,780	\$ 725,134	7.8%
Licenses & Permits				
Business Licenses	3,559,458	3,540,062	(19,396)	-0.5%
Franchise Fees	3,125,454	3,286,652	161,198	5.2%
MASC Insurance Tax Collection	2,906,377	3,443,005	536,628	18.5%
MASC Telecommunications	50,000	50,000	-	0.0%
Building Safety Permits	2,474,720	1,686,596	(788,125)	-31.8%
Application Fees	50,000	50,000	-	0.0%
Total Licenses & Permits	12,166,009	12,056,314	(109,695)	-0.9%
Grants and Entitlements	1,539,292	2,911,913	1,372,621	89.2%
Intergovernmental	444,099	461,608	17,509	3.9%
Service Revenues	811,680	492,860	(318,820)	-39.3%
Fines & Fees	115,000	115,000	-	0.0%
Interest Income	25,000	300,000	275,000	1100.0%
Miscellaneous Revenues	120,000	185,915	65,915	54.9%
Sub-Total Revenues	24,513,726	26,541,390	2,027,664	8.3%
Other Financing Sources				
Transfers In				
Hospitality Tax	2,123,436	3,305,561	1,182,125	55.7%
Capital Improvement Program Fund	400,000	-	(400,000)	-100.0%
Local Accommodations Tax	223,643	536,059	312,416	139.7%
State Accommodations Tax	76,507	76,130	(377)	-0.5%
Stormwater Fund	335,866	459,675	123,809	36.9%
General Fund Prior Year Fund Balance (PYFB)	3,091,338	799,310	(2,292,028)	-74.1%
General Fund PYFB - ARPA	411,847	306,857	(104,990)	-25.5%
General Fund PYFB - Capital Asset Reserve	531,920	443,458	(88,462)	-16.6%
Total Transfers In	7,194,557	5,927,050	(1,267,507)	-17.6%
Total Other Financing Sources & Transfers In	7,194,557	5,927,050	(1,267,507)	-17.6%
Total Revenues and Other Financing Sources	\$ 31,708,283	\$ 32,468,440	\$ 760,157	2.4%
Expenditures				
Building Safety	\$ 1,063,670	\$ 1,062,731	\$ (939)	-0.1%
Communications & Community Outreach	615,455	939,738	324,283	52.7%
Customer Service	286,962	300,141	13,179	4.6%
Economic Development: DRCI	493,464	486,487	(6,977)	-1.4%
Executive	1,494,879	1,804,783	309,904	20.7%
Finance & Administration	1,171,083	1,172,916	1,833	0.2%
Human Resources	647,972	639,020	(8,952)	-1.4%
Information Technology	2,352,769	2,136,799	(215,970)	-9.2%
Municipal Judges	105,848	107,581	1,733	1.6%
Municipal Court	485,421	500,485	15,064	3.1%
Planning & Community Development	1,576,938	1,941,541	364,603	23.1%
Police	10,563,270	11,923,481	1,360,211	12.9%
Project Management	971,296	826,707	(144,589)	-14.9%
Public Services	2,168,092	3,097,840	929,748	42.9%
Town Council	197,005	185,014	(11,991)	-6.1%
Townwide (Non-Departmental)	3,570,492	4,160,970	590,478	16.5%
Total Expenditures	27,764,616	31,286,233	3,521,617	12.7%
Other Funding Uses				
Contribution to Fund Balance	400,931	-	(400,931)	-100.0%
Transfers Out to Capital Improvements Program Fund	3,542,736	1,182,207	(2,360,529)	-66.6%
Total Transfers	3,943,667	1,182,207	(2,761,460)	-70.0%
Total Expenditures and Other Funding Uses	\$ 31,708,283	\$ 32,468,440	\$ 760,157	2.4%



**Town of Bluffton
Local Hospitality Tax Fund Budget
Special Revenue**

Attach

Section VIII. Item #1.

	Revised FY 2024 Budget	Proposed FY 2025 Budget	\$ Budget Change	% Budget Change
Revenues				
Taxes	\$ 3,778,036	\$ 4,120,747	\$ 342,711	9.1%
Interest Income	10,000	20,000	10,000	100.0%
Sub-Total Revenues	<u>3,788,036</u>	<u>4,140,747</u>	<u>352,711</u>	<u>9.3%</u>
 Other Financing Sources	-	-	-	
Transfers In				
Prior Year Fund Balance	4,704,916	4,108,119	(596,797)	-12.7%
Total Other Financing Sources & Transfers In	<u>4,704,916</u>	<u>4,108,119</u>	<u>(596,797)</u>	<u>-12.7%</u>
 Total Revenues and Other Financing Sources	<u>\$ 8,492,952</u>	<u>\$ 8,248,866</u>	<u>\$ (244,086)</u>	<u>-2.9%</u>
 Expenditures				
Other Funding Uses				
Transfers Out to Capital Improvements Program Fund	\$ 6,369,516	\$ 4,943,305	\$ (1,426,211)	-22.4%
Transfers Out to General Fund	2,123,436	3,305,561	1,182,125	55.7%
Total Transfers	<u>8,492,952</u>	<u>8,248,866</u>	<u>(244,086)</u>	<u>-2.9%</u>
 Total Expenditures and Other Funding Uses	<u>\$ 8,492,952</u>	<u>\$ 8,248,866</u>	<u>\$ (244,086)</u>	<u>-2.9%</u>



Town of Bluffton
Local Accommodations Tax Fund Budget
Special Revenue

Attach

Section VIII. Item #1.

	Revised FY 2024 Budget	Proposed FY 2025 Budget	\$ Budget Change	% Budget Change
Revenues				
Taxes	\$ 1,594,000	\$ 1,337,930	\$ (256,070)	-16.1%
Interest Income	3,500	5,000	\$ 1,500	42.9%
Sub-Total Revenues	1,597,500	1,342,930	(254,570)	-15.9%
Other Financing Sources				
Transfers In	-	-	-	
Prior Year Fund Balance	1,700,798	822,676	(878,122)	-51.6%
Total Other Financing Sources & Transfers In	1,700,798	822,676	(878,122)	-51.6%
Total Revenues and Other Financing Sources	<u>\$ 3,298,298</u>	<u>\$ 2,165,606</u>	<u>\$ (1,132,692)</u>	<u>-34.3%</u>
Expenditures				
Other Funding Uses				
Transfers Out to Capital Improvements Program Fund	\$ 3,074,655	\$ 1,629,547	\$ (1,445,108)	-47.0%
Transfers Out to General Fund	223,643	536,059	312,416	139.7%
Total Transfers	3,298,298	2,165,606	(1,132,692)	-34.3%
Total Expenditures and Other Funding Uses	<u>\$ 3,298,298</u>	<u>\$ 2,165,606</u>	<u>\$ (1,132,692)</u>	<u>-34.3%</u>



**Town of Bluffton
Stormwater Fund Budget**

Attach Section VIII. Item #1.

	Revised FY 2024 Budget	Proposed FY 2025 Budget	\$ Budget Change	% Budget Change
Revenues				
Stormwater Utility Fee	\$ 2,067,705	\$ 2,076,862	\$ 9,157	0.4%
Licenses & Permits				
NPDES Plan Review and Inspection Fees	513,500	383,595	(129,905)	-25.3%
Total Licenses & Permits	513,500	383,595	(129,905)	-25.3%
Sub-Total Revenues	2,581,205	2,460,457	(120,748)	-4.7%
Other Financing Sources	-	-	-	
Transfers In				
Prior Year Fund Balance	804,814	1,557,214	752,400	93.5%
Total Other Financing Sources & Transfers In	804,814	1,557,214	752,400	93.5%
Total Revenues and Other Financing Sources	\$ 3,386,019	\$ 4,017,671	\$ 631,652	18.7%
Expenditures				
Watershed Resiliency	\$ 1,550,712	\$ 1,980,912	\$ 430,200	27.7%
Total Expenditures	1,550,712	1,980,912	430,200	27.7%
Other Funding Uses				
Transfers Out to Capital Improvements Program Fund	1,205,641	1,281,034	75,393	6.3%
Transfers Out to General Fund	335,866	459,675	123,809	36.9%
Transfer to Debt Service	293,800	296,050	2,250	0.8%
Total Transfers	1,835,307	2,036,759	201,452	11.0%
Total Expenditures and Other Funding Uses	\$ 3,386,019	\$ 4,017,671	\$ 631,652	18.7%



**Town of Bluffton
Capital Improvements Project Fund**

	Revised FY 2024 Budget	Proposed FY 2025 Budget	\$ Budget Change	% Budget Change
Revenues				
Licenses & Permits	\$ 377,860	\$ 317,000	\$ (60,860)	-16.1%
Grants and Entitlements	700,000	1,506,543	806,543	115.2%
Intergovernmental	2,000,000	500,000	(1,500,000)	-75.0%
Total Revenues	3,077,860	2,323,543	(754,317)	-24.5%
Other Financing Sources				
Transfers In	-	-	-	
Hospitality Tax	6,369,516	4,943,305	(1,426,211)	-22.4%
Local Accommodations Tax	3,074,655	1,629,547	(1,445,108)	-47.0%
State Accommodations Tax	154,523	152,941	(1,582)	-1.0%
Stormwater Fund	1,205,641	1,281,034	75,393	6.3%
TIF	5,657,460	8,206,402	2,548,942	45.1%
General Fund	3,384,591	941,000	(2,443,591)	-72.2%
General Fund-ARPA	158,145	241,207	83,062	52.5%
CIP Fund Balance	14,555,247	13,549,135	(1,006,112)	-6.9%
Total Other Financing Sources & Transfers In	34,559,778	30,944,571	(3,615,207)	-10.5%
Total Revenues and Other Financing Sources	\$ 37,637,638	\$ 33,268,114	\$ (4,369,524)	-11.6%
Expenditures				
Economic Development Projects	\$ 3,504,420	\$ 3,204,420	\$ (300,000)	-8.6%
Facilities Projects	2,480,861	2,531,432	50,571	2.0%
Housing Projects	1,676,044	1,478,480	(197,564)	-11.8%
Information Technology Infrastructure Projects	208,471	436,000	227,529	109.1%
Land Acquisition	4,993,220	2,959,387	(2,033,833)	-40.7%
Park Projects	11,530,565	11,551,150	20,585	0.2%
Road Projects	3,475,572	3,370,513	(105,059)	-3.0%
Stormwater and Sewer Projects	9,190,625	7,419,732	(1,770,893)	-19.3%
Total Project Expenditures	37,059,778	32,951,114	(4,108,664)	-11.1%
Other Funding Uses				
Transfer to General Fund	400,000	-	(400,000)	-100.0%
Contribution to Fund Balance	177,860	317,000	139,140	78.2%
Total Other Funding Uses	577,860	317,000	(260,860)	-45.1%
Total Expenditures and Other Funding Uses	\$ 37,637,638	\$ 33,268,114	\$ (4,369,524)	-11.6%



**Town of Bluffton
Debt Service Fund Budget**

Attachment Section VIII. Item #1.

	Revised FY 2024 Budget	Proposed FY 2025 Budget	\$ Budget Change	% Budget Change
Revenues				
Property Taxes				
Real & Personal Property Tax (TIF)	\$ 3,196,680	\$ 4,702,200	\$ 1,505,520	47.1%
GO Bond Debt Service Property Tax	384,160	439,620	55,460	14.4%
Total Property Tax	3,580,840	5,141,820	1,560,980	43.6%
Licenses & Permits				
Municipal Improvement District Fee	365,860	368,887	3,027	0.8%
Interest Income	4,400	25,000	20,600	468.2%
Sub-Total Revenues	3,951,100	5,535,707	1,584,607	40.1%
Transfers In				
Stormwater Fund	293,800	296,050	2,250	0.8%
Prior Year Fund Balance	3,658,324	4,620,409	962,085	26.3%
Total Other Financing Sources & Transfers In	3,952,124	4,916,459	964,335	24.4%
Total Revenues and Other Financing Sources	<u>\$ 7,903,224</u>	<u>\$ 10,452,166</u>	<u>\$ 2,548,942</u>	<u>32.3%</u>
Expenditures				
Series 2014 TIF Bonds Debt Service				
Principal	\$ 873,554	\$ 896,386	\$ 22,832	2.6%
Interest	58,127	35,295	(22,832)	-39.3%
Series 2022 TIF Bonds Debt Service				
Principal	316,599	327,553	10,954	3.5%
Interest	324,334	313,380	(10,954)	-3.4%
Series 2020 GO Bonds Debt Service				
Principal	245,000	255,000	10,000	4.1%
Interest	134,300	122,050	(12,250)	-9.1%
Series 2020A GO Bonds Debt Service (Projects)				
Principal	155,000	165,000	10,000	6.5%
Interest	138,800	131,050	(7,750)	-5.6%
Miscellaneous	50	50	-	0.0%
Sub-Total Expenditures	2,245,764	2,245,764	-	0.0%
Other Funding Uses				
Transfers Out to Capital Improvements Program Fund	5,657,460	8,206,402	2,548,942	45.1%
Total Transfers	5,657,460	8,206,402	2,548,942	45.1%
Total Expenditures and Other Funding Uses	<u>\$ 7,903,224</u>	<u>\$ 10,452,166</u>	<u>\$ 2,548,942</u>	<u>32.3%</u>



**Town of Bluffton
Consolidated Budget**

	Revised FY 2024 Budget	Proposed FY 2025 Budget	\$ Budget Change	% of Budget Change
Revenues				
Property Taxes	\$ 12,873,486	\$ 15,159,600	\$ 2,286,114	17.8%
Local Hospitality & Accommodations Taxes	5,372,036	5,458,677	86,641	1.6%
Licenses & Permits	15,490,934	15,202,659	(288,275)	-1.9%
Grants & Entitlements	2,239,292	4,418,456	2,179,164	97.3%
Intergovernmental	2,444,099	961,608	(1,482,491)	-60.7%
Service Revenues	811,680	492,860	(318,820)	-39.3%
Fines & Fees	115,000	115,000	-	0.0%
Interest Income	42,900	350,000	307,100	715.9%
Miscellaneous Revenues	120,000	185,915	65,915	54.9%
Sub-Total Revenues	39,509,427	42,344,774	2,835,347	7.2%
Other Financing Sources	-	-	-	
Transfers In	52,916,987	48,276,088	(4,640,899)	-8.8%
Total Other Financing Sources & Transfers In	52,916,987	48,276,088	(4,640,899)	-8.8%
Total Revenues and Other Financing Sources	\$ 92,426,414	\$ 90,620,863	\$ (1,805,552)	-2.0%
Expenditures				
Building Safety	\$ 1,063,670	\$ 1,062,731	\$ (939)	-0.1%
Communications & Community Outreach	615,455	939,738	324,283	52.7%
Customer Service	286,962	300,141	13,179	4.6%
Economic Development	493,464	486,487	(6,977)	-1.4%
Executive	1,494,879	1,804,783	309,904	20.7%
Finance & Administration	1,171,083	1,172,916	1,833	0.2%
Human Resources	647,972	639,020	(8,952)	-1.4%
Information Technology	2,352,769	2,136,799	(215,970)	-9.2%
Municipal Judges	105,848	107,581	1,733	1.6%
Municipal Court	485,421	500,485	15,064	3.1%
Planning & Community Development	1,576,938	1,941,541	364,603	23.1%
Police	10,563,270	11,923,481	1,360,211	12.9%
Project Management	971,296	826,707	(144,589)	-14.9%
Public Services	2,168,092	3,097,840	929,748	42.9%
Town Council	197,005	185,014	(11,991)	-6.1%
Townwide (Non-Departmental)	3,570,492	4,160,970	590,478	16.5%
Watershed Management	1,550,712	1,980,912	430,200	27.7%
Capital Projects	37,059,778	32,951,114	(4,108,664)	-11.1%
Debt Service	2,245,764	2,245,764	-	0.0%
Sub-Total Expenditures	68,620,870	68,464,023	(156,847)	-0.2%
Other Funding Uses				
Contribution to Fund Balance	578,791	317,000	(261,791)	-45.2%
Transfers Out	23,226,753	21,839,840	(1,386,913)	-6.0%
Total Other Funding Uses & Transfers Out	23,805,544	22,156,840	(1,648,704)	-6.9%
Total Expenditures and Other Funding Uses	\$ 92,426,414	\$ 90,620,863	\$ (1,805,551)	-2.0%
	\$ -	\$ 0		

Master Fee Schedule – FY2025

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Master Fee Schedule – FY2025

Section I – Miscellaneous Fees

Item/Description	Basis	Fee
Printing, Reproduction, Documents		
Black and White Photocopies (8.5" X 11" or smaller)	Per Page	\$0.20
Color Photocopies	Per Page	\$0.25
Photocopies Larger than 8.5" X 11"	Per Page	\$0.25
Photocopies Plotter/Large Format Copies of Plans	Per Page	\$6.00
CD Copy	Per Disc	\$5.00
Staff Time making copies (no less than a 30-minute charge)	Per Hour	\$25.00
Election Fees		
To Elect Council	Per Election	\$100.00
To Elect Mayor	Per Election	\$150.00
Finance Fees		
NSF Returned Check Fee	Per Check	\$30.00
Old Town Business Directional Sign Fees		
Sign Production & Installation	Per Sign	At Cost

Section II – Police Department Fees

Item/Description	Basis	Fee
Police Services		
Off-Duty Police Officer	Per Hour, Per Officer	\$60.00
Police Reports, Photocopies & Records		
Police Report Copy Fee (No fee for victim)	Per Report up to 3 pages plus per page	\$5.00 + .25 cents per page above 3
Accident Report	Per Report up to 3 pages plus per page	\$10.00 + .25 cents per page above 3
Police Photographs, Audio or Video Recordings	Per Fee plus actual costs	\$20.00
	CD/DVD	\$5.00
	USB Thumb Drive	\$20.00
Police Permits		
Precious Metal Permit	Allowed by State Law	\$50.00

Section III – Business License Fees

Item/Description	Basis	Fee
Taxation Fees		
Hospitality Tax Fees	Per Ordinance	2% of Prepared Meals/ Beverages
Local Accommodation Tax Fees	Per Ordinance	3% of Gross Revenue for rentals 30 days or less
Penalties – Business License, Hospitality Tax, and Accommodations Tax	Per Month	5% per month

Master Fee Schedule – FY2025

Section III – Business License Fees (continued)

Rate Class	Minimum Rate	Minimum Gross Receipt	Rate Per Thousand or Fraction Thereof Over Minimum Gross
1	\$50.00	\$2,000.00	\$1.00
2	\$50.00	\$2,000.00	\$1.15
3	\$50.00	\$2,000.00	\$1.30
4	\$50.00	\$2,000.00	\$1.45
5	\$50.00	\$2,000.00	\$1.60
6	\$50.00	\$2,000.00	\$1.75
7	\$50.00	\$2,000.00	\$1.90
8.1	\$50.00	\$2,000.00	\$1.00
8.2	See SC Code		
8.3	MASC Telecommunications		
8.4	MASC Insurance		
8.51	\$12.50 business license for operation of all machines (not on gross income)		PLUS \$12.50/machine
8.52	\$12.50 business license for operation of all machines (not on gross income)		PLUS \$180.00/machine
8.6	\$50.00 business license for operation of all tables (not on gross income)		PLUS \$5.00 or \$12.50/table
9.1 and above	\$50.00	\$2,000.00	\$1.00
Non-Profit	N/A	N/A	N/A
NON-RESIDENT RATES			
<u>Unless otherwise specifically provided, all taxes and rates shall be doubled for nonresidents and itinerants having no fixed principal place of business within the municipality.</u>			

Item/Description	Basis	Fee
Other Business License Fees	Paid Annually in addition to	
Annual Mobile Vending Fee	Business License Tax	\$400.00

Special Events

Item/Description	Basis	Fee
Special Event Application Fee	<ul style="list-style-type: none"> Per Application; or, Per quarter if event is held more than twice a quarter 	\$50.00
Special Event Permit Fee	Paid by Special Event Sponsor	\$10.00
Special Event Unlicensed Vendor Fee	Per Unlicensed Vendor Paid by Sponsor	\$10.00

Master Fee Schedule – FY2025

Section IV – Facility Rental Fees

General

Item/Description	Basis	Fee
Reservation Request (Non-Refundable)	Per Facility	\$25.00
Non-Resident Surcharge	Percentage of Rental Fee	25%
Bluffton Police Department Officer	Per Hour	\$60.00
Lost Key	Each	\$25.00
Lost Pass Card	Each	\$25.00
Additional Notes: <ul style="list-style-type: none"> The Town Manager or designee may waive any or all fees if it is deemed in the best interests of the Town. Upon approval of a facility rental request, the Reservation Request fee shall be applied towards the applicable facility rental fees. 		

Rotary Community Center

Item/Description	Basis	Fee
Private Event Rental		
Rental Fee (6-hour Reservation; 1 hour Setup, 4-hour Event, 1 hour Cleanup)	Per Event	\$400.00
Daily Rate	Per Day	\$500.00
Security Deposit	Per Event	\$150.00
Cleaning Fee	Per Event	\$130.00
Non-Profit Rental		
Rental Fee (6-hour Reservation; 1 hour Setup, 4-hour Event, 1 hour Cleanup)	Per Event	\$200.00
Daily Rate	Per Day	\$300.00
Security Deposit	Per Event	\$150.00
Cleaning Fee	Per Event	\$130.00
Meeting Rental		
Rental Fee	Per Hour	\$50.00
Cleaning	Per Event	\$130.00
Additional Notes: <ul style="list-style-type: none"> The Town Manager or designee may waive any or all fees if it is deemed in the best interests of the Town. All fees will be collected at the Customer Service Center at Town Hall. Security Deposit may be refunded provided the park, facilities, and equipment are clean and returned to the condition that existed prior to the rental. Meeting rental cleaning fees may be negotiated based on meeting type, length, use, and frequency. A full refund of the Rental Fee and Security Deposit will be granted with cancellation notice at least 48-hours prior to the scheduled rental start. 		

Master Fee Schedule – FY2025

Section IV – Facility Rental Fees (continued)

Field of Dreams

Item/Description	Basis	Fee
4 Hour Access (6-hour Reservation; 1 hour Setup, 4-hour Event, 1 hour Cleanup)	Per Event	\$100.00
All Day Access	Per Day	\$150.00
Security Deposit	Per Event	\$150.00
Additional Notes: <ul style="list-style-type: none"> The Town Manager or designee may waive any or all fees if it is deemed in the best interests of the Town. All fees will be collected at the Customer Service Center at Town Hall. Security Deposit may be refunded provided the park, facilities, and equipment are clean and returned to the condition that existed prior to the rental. A full refund of the Rental Fee and Security Deposit will be granted with cancellation notice at least 48-hours prior to the scheduled rental start or if an event is rained out and the part not utilized. 		

Oyster Factory Park

Item/Description	Basis	Fee
Reservation of Park East of Wharf Street		
Rental Fee	Per Day	\$300.00
Less than Full Day (6-hour Reservation: 1 hour Setup, 4-hour Event, 1 hour Cleanup)	Per Event	\$150.00
Rental Fee – Non-Profit	Per Day	\$150.00
Less than Full Day (6-hour Reservation: 1 hour Setup, 4-hour Event, 1 hour Cleanup)	Per Event	\$75.00
Security Deposit	Per Rental	\$100.00
Reservation of Park West of Wharf Street		
Rental Fee	Per Day	\$100.00
Less than Full Day (6-hour Reservation: 1 hour Setup, 4-hour Event, 1 hour Cleanup)	Per Event	\$50.00
Rental Fee – Non-Profit	Per Day	\$50.00
Less than Full Day (6-hour Reservation: 1 hour Setup, 4-hour Event, 1 hour Cleanup)	Per Event	\$25.00
Security Deposit	Per Rental	\$100.00
Additional Notes: <ul style="list-style-type: none"> The Town Manager or designee may waive any or all of the fees if it is deemed in the best interests of the Town of Bluffton. All fees will be collected at the Customer Service Center at Town Hall. Security Deposit may be refunded provided the park, facilities, and equipment are clean and returned to the condition that existed prior to the rental. A full refund of the Rental Fee and Security Deposit will be granted with cancellation notice at least 48-hours prior to the scheduled rental start or if an event is rained out and the park not utilized. 		

Master Fee Schedule – FY2025

Section IV – Facility Rental Fees (continued)

Wright Family Park

Item/Description	Basis	Fee
Rental Fee	Per Day	\$300.00
Less than Full Day (6-hour Reservation: 1 hour Setup, 4-hour Event, 1 hour Cleanup)	Per Event	\$150.00
Rental Fee – Non-Profit	Per Day	\$150.00
Less than Full Day (6-hour Reservation: 1 hour Setup, 4-hour Event, 1 hour Cleanup)	Per Event	\$75.00
Security Deposit	Per Rental	\$100.00
Additional Notes: <ul style="list-style-type: none"> The Town Manager or designee may waive any or all of the fees if it is deemed in the best interests of the Town of Bluffton. All fees will be collected at the Customer Service Center at Town Hall. Security Deposit may be refunded provided the park, facilities, and equipment are clean and returned to the condition that existed prior to the rental. A full refund of the Rental Fee and Security Deposit will be granted with cancellation notice at least 48-hours prior to the scheduled rental start or if an event is rained out and the park not utilized. 		

Martin Family Park and Public Park @ Buckwalter Place Commerce Park (Park A and Park B)

Item/Description	Basis	Fee
Martin Family Park and Buckwalter Place Commerce Park (Park A)		
4 Hour Access (6-hour Reservation; 1 hour Setup, 4-hour Event, 1 hour Cleanup)	Per Event	\$100.00
All Day Access	Per Day	\$150.00
Security Deposit	Per Event	\$150.00
Buckwalter Place Commerce Park – Amphitheater Section (Park B) Includes green space, amphitheater, and building		
Rental Fee	Per Day	\$600.00
Less than Full Day (6-hour Reservation: 1 hour Setup, 4-hour Event, 1 hour Cleanup)	Per Event	\$300.00
Rental Fee – Non-Profit	Per Day	\$300.00
Less than Full Day (6-hour Reservation: 1 hour Setup, 4-hour Event, 1 hour Cleanup)	Per Event	\$150.00
Security Deposit	Per Day	\$150.00
Cleaning Fee	Per Event	\$130.00
Additional Notes: <ul style="list-style-type: none"> The Town Manager or designee may waive any or all fees if it is deemed in the best interests of the Town. All fees will be collected at the Customer Service Center at Town Hall. Security Deposit may be refunded provided the park, facilities, and equipment are clean and returned to the condition that existed prior to the rental. A full refund of the Rental Fee and Security Deposit will be granted with cancellation notice at least 48-hours prior to the scheduled rental start or if an event is rained out and the part not utilized. See page 15 for map of Buckwalter Place Commerce Park for the designation of Park A and Park B. 		

Master Fee Schedule – FY2025

Section V – RESERVED

Section VI – Growth Management Fees

Building Safety Fees

Item/Description	Basis (Value of Construction)	Fee
Applications – Calculated Fees		
New Structures Commercial and Residential	\$500 - \$2,000	\$35.00
	\$2,001 - \$3,000	\$38.50
	\$3,001 - \$50,000	\$38.50 + \$5.00 per \$1,000 or fraction thereof over \$1,000
	\$50,001 and above	\$273.50 + \$4.50 per \$1,000 or fraction thereof over \$50,000
Miscellaneous Construction Commercial and Residential	\$0 - \$1,000	\$35.00
	\$1,001 - \$2,000	\$70.00
	\$2,001 - \$3,000	\$77.00
	\$3,001 - \$50,000	\$77.00 + \$9.00 per \$1,000 or fraction thereof over \$3,000
Miscellaneous Construction Commercial	\$50,000 and above	\$500.00 + \$4.50 per \$1,000 or fraction thereof over \$50,000
Miscellaneous Construction Residential	\$50,000 and above	\$500.00 + \$4.00 per \$1,000 or fraction thereof over \$50,000
Multi-Family and Commercial Plans Check Fee	Each	75% of permit fee (non-refundable)
Residential Plans Check Fee	Each	50% of permit fee (non-refundable)

Master Fee Schedule – FY2025

Section VI – Growth Management Fees (continued)

Building Safety Fees (continued)

Item/Description	Basis (Value of Construction)	Fee
Application Fees		
Construction Trailers	Each	\$75.00
Demolition	Each	\$75.00
Electrical < 200 amps	Each	\$75.00
Electrical (pools/spas/water features)	Each	\$75.00
HVAC Change Out (per unit, single family or multi-family residential)	Each	\$75.00
HVAC Change Out COMMERCIAL	Each	\$75.00
Water Heater Change Out (per unit, single family or multi-family residential)	Each	\$75.00
Plumbing Permit	Each	\$75.00
Manufactured Homes	Each	\$25.00
Moving a Structure	Each	\$100.00
Spa (portable)	Each	\$50.00
Swimming Pool or Spa Single Family	Each	\$100.00
Swimming Pool or Spa Commercial	Each	\$150.00
Irrigation Systems (per system)	Each	\$100.00
Tent or Air Supported Structure	Each	\$100.00
Water Feature (Fountains)	Each	\$100.00
First Re-inspection per each permit	Each	\$100.00
Failure to obtain inspection approval	Each	\$100.00
Subsequent re-inspections per each permit	Each	\$150.00
Safety Inspection	Each	\$100.00
Residential Plan Remarking	Each	\$100.00
4 th copy of Building Plans for Remarking/Rechecking of Single Family Plans at Time of Initial Submittal	Each	\$25.00
Commercial Plan Remarking	Each	\$200.00
Construction Board of Adjustments and Appeals Application	Each	\$250.00
Work without Applicable Permit	Each	Value of permit fee X 3
Additional Notes: <ul style="list-style-type: none"> • Waiver of Fees. <ul style="list-style-type: none"> ○ Fees shall be waived for single family construction alterations to enlarge, alter, repair, remodel or add additions to existing structures when the value of said alteration is less than one thousand dollars (\$1,000.00). A permit is required. Mechanical work is not subject to this waiver. ○ Fees of less than two hundred dollars (\$200.00) for repair or renovation of single-family structures when the work to be performed is sponsored by a 501(C)(3) organization shall be waived upon submission of a letter to the building official verifying the sponsorship of the work to be performed. ○ Fees shall be waived for all permits associated with the Neighborhood Assistance Program and Affordable Housing Public Private Partnerships. ○ The Town Council may waive any or all fees if it is deemed in the best interests of the Town. 		

Section VI – Growth Management Fees (continued)

Building Safety Fees (Additional Notes continued)

- Plan checking fees.
 - When the value of construction for multi-family or commercial structures exceeds one thousand dollars (\$1,000.00) and a plan is required to be submitted, a plan checking fee shall be paid to the building department at the time of plan submittal and specifications for checking. Said plan checking fee shall be equal to seventy-five (75%) percent of the building or miscellaneous permit fee.
 - Residential (Single Family) Plan Check Fees are required for all permits that require a plans check regardless of the value of construction. Said plans checking fee shall be equal to fifty percent (50%) of the building or miscellaneous fee.
 - A fee of **one hundred dollars (\$100.00)** shall be charged for all remarking/rechecking of single-family plans **after issuance**. Commercial remarking/rechecking fee shall be one half (½) of the original plan checking fee or \$200.00 whichever is less.
- Residential HVAC change out permits do not include duct work.
- Additional details regarding fees are contained in the Municipal Code of the Town of Bluffton, Chapter 5, Official Construction Code, Section 109.Fees.

Planning and Environmental Applications and Permits

Item/Description	Basis	Application Fee
Addressing	Each	\$0.00
Annexation:		
100% Petition	Each	\$500.00
75% Petition	Each	\$650.00
25% Petition	Each	\$650.00
Appeal	Each	Residential \$250.00 Commercial \$500.00
Certificate of Appropriateness:		
Highway Corridor Overlay District	Each	\$500.00
Amendment	Each	\$100.00
Extension	Each	\$50.00
Historic District	Each	\$500.00
Amendment	Each	\$100.00
Extension	Each	\$50.00
Historic District – Demolition	Each	\$250.00
Certificate of Construction Compliance	Each	\$100.00
Comprehensive Plan Amendment	Each	\$500.00
Designation of Contributing Structure	Each	\$250.00
Development Agreement:		
New	Each	\$2,000.00
Amendment	Each	\$2,000.00
Development Plan:		
Preliminary	Each	\$750.00
Final	Each	\$1,000.00
Amendment	Each	\$750.00
Extension	Each	\$300.00

Master Fee Schedule – FY2025

Section VI – Growth Management Fees (continued)

Planning and Environmental Applications and Permits (continued)

Item/Description	Basis	Application Fee
Development Agreement:		
New	Each	\$2,000.00
Amendment	Each	\$2,000.00
Development Plan:		
Preliminary	Each	\$750.00
Final	Each	\$1,000.00
Amendment	Each	\$750.00
Extension	Each	\$300.00
Development Surety	Each	\$100.00
Emergency Permitting	Each	\$0.00
HD Signage and Site Features	Each	\$50.00
Exempt Plat	Each	\$50.00

Planning and Environmental Sustainability Fees

Item/Description	Basis	Application Fee
Printed Copy:		
Annexation Policy & Procedure Manual	Each	\$25.00
Application Manual	Each	\$55.00
Stormwater Design Manual	Each	\$60.00
UDO, Comp. Plan	Each	\$95.00
PUD Concept Plan:		
New	Each	\$750.00
Amendment	Each	\$250.00
PUD Master Plan:		
New	Each	\$750.00
Amendment	Each	\$250.00
Extension	Each	\$250.00
Public Project	Each	\$0.00
Sign	Each	\$50.00
Silviculture	Each	\$1,500.00
Special Exception	Each	\$500.00
Street Naming	Each	\$0.00
Street Renaming	Each	\$250.00
Subdivision:		
General:		
New	Each	\$200 + 10.00/lot
Amendment	Each	\$50.00 + \$10.00/lot
Extension	Each	\$50.00 + \$10.00/lot
Historic District:		
New	Each	\$100.00 + \$10.00/lot
Amendment	Each	\$50.00 + \$10.00/lot
Extension	Each	\$50.00 + \$10.00/lot

Master Fee Schedule – FY2025

Section VI – Growth Management Fees (continued)

Planning and Environmental Sustainability Fees (continued)

Transfer of Development Rights	Each	\$1,000.00
Tree Removal	Each	\$75.00
UDO Text Amendment	Each	\$750.00
Variance	Each	Residential \$250.00 Commercial \$500.00
Zoning Map Amendment	Each	\$750.00
Zoning Permit	Each	\$100.00
Zoning Verification Letter	Each	Basic \$25.00 Advanced \$100.00
Additional Notes: <ul style="list-style-type: none"> Town Council may waive any or all fees for applications if it is deemed in the best interest of the Town. Applications requiring additional Public Hearings above and beyond the number specified in the Growth Management Application Table in the UDO Application Manual shall be subject to a \$200.00 fee per additional Public Hearing. In the event that a Feasibility Study for an Annexation Application will need to be contracted out to a third party, the Application shall be responsible for the full cost of the Study. Building Permit and Business License Application Fees include the Zoning Permit Application Fee therefore, no additional fee is necessary. 		

Developmental Agreement Fees

Item/Description	Basis	Fee
Bluffton Village		
Commercial, Retail, and Multi-Family Space		Fee Per Development Agreement
Individual Dwelling Units		Fee Per Development Agreement
Dependency Units		Fee Per Development Agreement
Boat Ramp Fee (per dwelling units)	Each	\$25.00
Buckwalter		
Single Family Residential (SFR) Affordable Housing		Fee Per Development Agreement
SFR < 2,000 sq. ft.		Fee Per Development Agreement
SFR > 2,000 sq. ft. to 3,000 sq. ft.		Fee Per Development Agreement
SFR > 3,000 sq. ft.		Fee Per Development Agreement
Multi-Family (MF) – 1 bedroom		Fee Per Development Agreement
Multi-Family (MF) – 2 bedroom		Fee Per Development Agreement
Multi-Family (MF) – 3 bedroom		Fee Per Development Agreement
Commercial Development		Fee Per Development Agreement
Municipal Improvement Development Fee – All Residential Units Within: Baynard Park, Hampton Lake, Resort Tract, Lawton Station, Northern Tract, Parkside, Rose Dhu Creek Phases II & III	Each	\$900.00
Boat Ramp Fee (per dwelling units)	Each	\$25.00

Master Fee Schedule – FY2025

Section VI – Growth Management Fees (continued)

Developmental Agreement Fees (continued)

Jones Estate Single Family Residential (SFR) Affordable Housing < \$124,000 SFR < 2,000 sq. ft. SFR > 2,000 sq. ft. to 3,000 sq. ft. SFR > 3,000 sq. ft. Multi-Family (MF) – 1 bedroom Multi-Family (MF) – 2 bedroom Multi-Family (MF) – 3 bedroom Commercial Development Municipal Improvement Development Fee – All Residential Units Within: Cypress Ridge Boat Ramp Fee (per dwelling units)	Each	Fee Per Development Agreement
	Each	Fee Per Development Agreement
Schultz Tract, New Riverside, Palmetto Bluff Single Family Residential (SFR) Multi Family Commercial Per Square Foot Municipal Improvement Development Fee – All Residential Units Within: New Riverside Boat Ramp Fee (per dwelling units)	Each	Fee Per Development Agreement
	Each	Fee Per Development Agreement
Village at Verdier Plantation Single Family Residential (SFR) < 1,800 sq. ft. SFR 1,801 – 2,400 sq. ft. SFR 2,401 – 3,000 sq. ft. SFR > 3,000 sq. ft. Multi-Family (MF) – 1 bedroom Multi-Family (MF) – 2 bedroom Multi-Family (MF) – 3 bedroom Commercial Development Boat Ramp Fee (per dwelling units)	Each	Fee Per Development Agreement
	Each	Fee Per Development Agreement
Additional Notes: <ul style="list-style-type: none"> Town Council may waive any or all fees if it is deemed in the best interests of the Town. 		

Master Fee Schedule – FY2025

Section VII – Stormwater Management Fees

Residential Land Uses

Residential Type	Factor	Fee
Administrative Fee		\$5.00
Impervious Area Units (IA)		\$85.00
Tier 1 – Single Family Unit \leq 2,521 sq. ft.	0.50	
Tier 2 – Single Family Unit 2,522 to 7,265 sq. ft.	1.00	
Tier 3 – Single Family Unit \geq 7,266 sq. ft.	1.50	
Mobile Homes	0.36	
Apartments	0.39	
Townhouses	0.60	
Condominiums	0.27	
Commercial (Impervious Area – IA; Square Feet – SF)	IA * 4,906 SF	
Gross Area Charge (GA)		\$25.00
First 2 acres	1.00	
For every acre above 2 acres and up to 10 acres	0.50	
For every acre above 10 acres and up to 100 acres	0.40	
For every acre above 100 acres	0.30	
Town of Bluffton SWU		\$115.00
<p>The formula is as follows:</p> <p>Calculation of Tier 1 Single Family Units on less than 2 acres: $\\$85 * .5 = \\$42.50 + \\$25.00 + \\$5.00 = \\$72.50$</p> <p>Calculation Example of Tier 3 Single Family Unit with GA of 7 acres: $\\$127.50 + 25.00 + ((7-2) \times .5 \times 25 = 62.50) + 5.00 = \\215.00</p> <p>Non-residential properties are charged the same rate as residential properties. Vacant Land is charged various runoff rates based on parcel category and whether land is disturbed or undisturbed. Fees can vary from \$0.44 to \$21.79 per acre.</p>		

National Pollutant Discharge Elimination System (NPDES) Fees

Item/Description	Fee
Stormwater Plan Review Fee	
Residential <1 acre (not part of subdivision)	Exempt
Residential (single family or subdivision), Multi-family, or Non-Residential per disturbed acre (round up to the next whole acre)	\$250.00 (\$5,000 max)
Stormwater Plan Amendment/Resubmittal Fee	
Residential <1 acre (not part of subdivision)	Exempt
Residential (single family or subdivision), Multi-family, or Non-Residential per disturbed acre (round up to the next whole acre)	\$150.00 (\$2,500 max)

Master Fee Schedule – FY2025

Section VII – Stormwater Management Fees (continued)

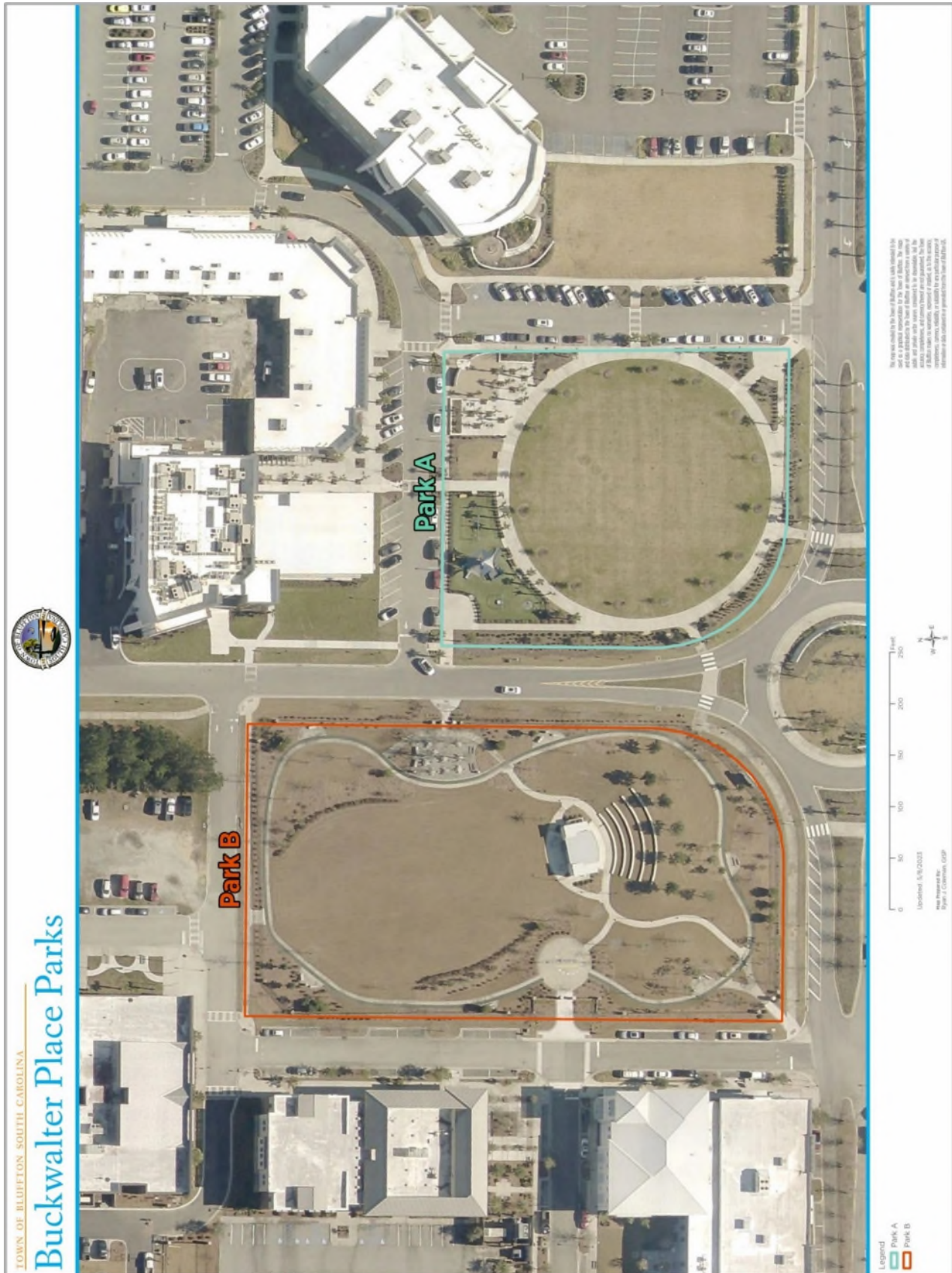
National Pollutant Discharge Elimination System (NPDES) Inspection Fees

Item/Description	# of Acres	Fee
Erosion Control Inspection & Re-Inspection Fees		
Residential <1 acre (not part of subdivision)		\$150.00 /inspection
Residential (single family or subdivision), Multi-family, or Non-Residential per disturbed acre (round up to the next whole acre)	0.0-0.99 acres 1.0-5.0 acres 5.01-10 acres 10.01+ acres	\$150.00/inspection \$250.00/inspection \$350.00/inspection \$450.00/inspection
Re-Inspection Resulting for Notice of Violation Fee		
Residential <1 acre (not part of subdivision)		\$150 200.00 /inspection \$200.00 to remove Stop Work Order
Residential (single family or subdivision), Multi-family, or Non-Residential per disturbed acre (round up to the next whole acre)	0.0-0.99 acres 1.0-5.0 acres 5.01-10 acres 10.01+ acres	\$200.00 \$300.00 \$400.00 \$500.00 \$250.00 to remove Work Order
Re-Inspection Resulting from Stop Work Order (SWO)		
Residential <1 acre (not part of subdivision)		\$200
Residential (single family or subdivision), Multi-Family, or Non-Residential per disturbed acre (round up to the next whole acre)	0.0-0.99 acres 1.0-5.0 acres 5.01-10 acres 10.01+ acres	\$200 \$300 \$400 \$500
Waiver Request		
Residential <1 acre (not part of subdivision)		Exempt
Residential (single family or subdivision), Multi-family, or Non-residential per disturbed acre (round up to the next whole acre)		\$350.00

Master Fee Schedule – FY2025

Notice of Termination (NOT) Fees		
Notice of Termination (NOT) Review		\$100.00
Notice of Termination (NOT) Resubmittal Review		\$50.00
Notice of Termination (NOT) Residential Inspection	0.0-0.99 acres	\$100.00
	1.0-5.0 acres	\$150.00
	5.01-10 acres	\$200.00
	10.01+ acres	\$250.00
Notice of Termination (NOT) Residential Re-Inspection	0.0-0.99 acres	\$50.00
	1.0-5.0 acres	\$100.00
	5.01-10 acres	\$150.00
	10.01+ acres	\$200.00

Buckwalter Place Commerce Park, Park A and Park B



TOWN COUNCIL



STAFF REPORT
Finance & Administration Department

MEETING DATE:	June 11, 2024
PROJECT:	Consideration of Approval of Resolution for the FY2025 Budget and Marketing Plan Presented by the Hilton Head Island-Bluffton Chamber of Commerce in Accordance with Contract 2022-35 as the Town of Bluffton Designated Marketing Organization (Fiscal Impact – \$350,000)
PROJECT MANAGER:	Natalie Majorkiewicz, CGFO, Director of Finance & Administration

REQUEST:

Town Council to authorize the Town Manager to renew the contract with the Hilton Head Island-Bluffton Chamber of Commerce to continue to serve as the Town of Bluffton’s Designated Marketing Organization (DMO) for fiscal year 2025 and approve the Accommodations Tax Advisory Committee’s (ATAC) recommendation.

BACKGROUND:

In accordance with the grant process, the Accommodations Tax Advisory Committee (ATAC) held a meeting on May 21, 2024, where the Hilton Head Island-Bluffton Chamber of Commerce presented the FY2025 budget and marketing plan.

❑ Designated Marketing Organization Budget and Marketing Plan for FY2025

- As part of contract 2022-35 that began on July 1, 2022, the Hilton Head Island-Bluffton Chamber of Commerce proposed a fiscal year 2025 budget of \$350,000 for the Town of Bluffton.
- S.C. Code of Laws Sec. 6-4-10-(3) requires the Town’s DMO to manage and direct 30% of the balance of State Accommodations Tax funds and submit a budget for approval before the beginning of each fiscal year.
- Per Town of Bluffton Code of Ordinances, Sec. 24-26(b), “the Town may set aside an amount not to exceed eight percent (8%) of Local Accommodations Tax revenue for the Designated Marketing Organization.” There are no Local Accommodations Tax funds budgeted for the DMO in FY2025.
- FY2025 will be the final year of a three-year term of the contract.

Below is a comparison between the FY2024 and FY2025 budgets:

Bluffton Marketing Strategies and Programs	FY2024 Budget	FY2025 Budget	% Increase/ (Decrease)
Research & Planning	\$ 10,400	\$ 9,800	(6%)
Website Maintenance	15,600	14,700	(6%)
Website Hosting	936	1,176	26%
Social Marketing & Content Strategy	15,6000	14,700	(6%)
Paid Social	50,000	35,280	(29%)
Digital Promotions/SEM	37,032	21,303	(42%)
SEO	9,360	9,800	5%
Bluffton Insiders (enews)	10,400	9,800	(6%)
Bluffton Blog	7,072	-	(100%)
Bluffton Vacation Planner/Fulfillment	61,360	61,250	0%
Regional Vacation Planner/Fulfillment	18,200	21,560	18%
Media Partnerships	26,000	12,250	(53%)
Group Tour	1,040	-	(100%)
Photography/Videography	20,800	4,900	(76%)
Contingency	5,200	2,231	(57%)
Operations & Management	136,000	131,250	(3%)
Total:	\$ 425,000	\$ 350,000	(18%)

The committee voted to recommend the Hilton Head Island-Bluffton Chamber of Commerce's Town of Bluffton DMO budget and marketing plan for FY2025.

NEXT STEPS:

Upon approval by Town Council, the Town Manager will authorize the resolution for FY2025.

SUMMARY:

The resolution will be for one year beginning on July 1, 2024 through June 30, 2025 and in accordance with contract 2022-35.

ATTACHMENTS:

1. Presentation
2. Resolution Approving FY2025 Budget and Marketing Plan
3. DMO Contract 2022-35 between Hilton Head Island-Bluffton Chamber of Commerce and Town of Bluffton
4. Hilton Head Island-Bluffton Chamber of Commerce: FY2025 Budget and Marketing Plan
5. Recommended Motion



Consideration of Approval of Resolution for the FY2025 Budget and Marketing Plan Presented by the Hilton Head Island-Bluffton Chamber of Commerce in Accordance with Contract 2022-35 as the Town of Bluffton Designated Marketing Organization

Presentation to Town Council

Natalie Majorkiewicz, Department of Finance & Administration

June 11, 2024

Background

- S.C. Code of Laws Sec. 64-10-(3)
 - Requires 30% of the balance of State Accommodations Tax funds to be managed by a selected organization to advertise and promote tourism
 - The selected organization submit a budget prior to each fiscal year
- Accommodations Tax Advisory Committee (ATAC) meeting May 21, 2024
- FY2025 proposed Town of Bluffton budget does not have any Local Accommodations Tax funds set aside for DMO purposes.
- FY2024 will be year three of contract 2022-35 that began on July 1, 2022.

Background (Continued)

Bluffton Marketing Strategies and Programs	FY2024 Budget	FY2025 Budget	% Increase/ (Decrease)
Research & Planning	\$ 10,400	\$ 9,800	(6%)
Website Maintenance	15,600	14,700	(5%)
Website Hosting	936	1,176	26%
Social Marketing & Content Strategy	15,600	14,700	(6%)
Paid Social	50,000	35,280	(29%)
Digital Promotions/SEM	37,032	21,303	(42%)
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Contingency	5,200	2,231	(57%)
Operations & Management	136,000	131,250	(3%)
Total:	\$ 425,000	\$ 350,000	(18%)

Recommendation & Next Steps

- Town Staff recommends Town Council approve the Resolution
- Upon approval, Town Manager will authorize the Resolution for FY2025

Summary

The resolution will be for one year beginning on July 1, 2024 through June 30, 2025 and in accordance with contract 2022-35.



Questions & Discussion

Recommended Motion

*“I make a motion to approve a Resolution
for the FY2025 Budget and Marketing Plan presented by the
Hilton Head Island-Bluffton Chamber of Commerce
in accordance with contract 2022-35
as the Town of Bluffton’s Designated Marketing Organization.”*

RESOLUTION

A RESOLUTION OF THE TOWN OF BLUFFTON APPROVING THE HILTON HEAD ISLAND – BLUFFTON CHAMBER OF COMMERCE TO MANAGE AND DIRECT THE EXPENDITURE OF THE SPECIAL FUND OF THE TOWN OF BLUFFTON CONSISTING OF THIRTY PERCENT (30%) OF THE BALANCE OF STATE ACCOMMODATIONS TAX REVENUE TO BE USED ONLY FOR ADVERTISING AND PROMOTION OF TOURISM TO DEVELOP AND INCREASE TOURIST ATTENDANCE THROUGH THE GENERATION OF PUBLICITY AS OUTLINED IN THE FY2025 BUDGET AND MARKETING PLAN AND IN ACCORDANCE WITH CONTRACT 2022-35.

WHEREAS, S.C. Code § 6-4-10 provides, in part, that the funds received by a municipality collecting more than fifty thousand dollars (\$50,000) from the local accommodations tax must allocate thirty percent (30%) of the balance received as defined in said code section to a special fund to be used only for advertising and promotion of tourism to develop and increase tourist attendance through the generation of publicity; and

WHEREAS, S.C. Code § 6-4-10 provides, in part, that the Town of Bluffton shall designate one or more organizations, such as a chamber of commerce, visitor and convention bureau, or regional tourism commission, which has an existing, ongoing tourist promotion program to manage and direct the expenditure of these tourism promotion funds; and

WHEREAS, the Town of Bluffton awarded contract 2022-35 to the Hilton Head Island-Bluffton Chamber of Commerce as the Town of Bluffton’s Designated Marketing Organization that began on July 1, 2022 and shall continue for a period of three (3) years.

NOW, THEREFORE, BE IT RESOLVED BY THE TOWN COUNCIL OF THE TOWN OF BLUFFTON, SOUTH CAROLINA, AS FOLLOWS:

- The Hilton Head Island – Bluffton Chamber of Commerce continue as the Designated Marketing Organization (DMO) to manage and direct the expenditures of the special fund for FY2025; and
- In accordance with South Carolina state law, the DMO has submitted for approval an annual budget of planned expenditures by April 1st for FY2025.
- For FY 2025, Thirty percent (30%) of the balance of state accommodation tax as designated by Section 6-4-10(3) of the South Carolina Code of Laws, 1976 as amended be allocated to the special fund; and
- For FY 2025, an amount of zero percent (0%) of local accommodations tax be allocated to the special fund; and
- Immediately upon receipt to the special fund on a quarterly basis, the Town shall distribute the tourism promotion funds to the DMO; and

- The DMO shall render to the Town an accounting of all FY2025 expenditures by no later than November 1, 2025.

THIS RESOLUTION SHALL TAKE FULL FORCE AND EFFECT ON JULY 1, 2024.

SIGNED, SEALED AND DELIVERED AS OF THIS 11th DAY OF JUNE 2024.

Larry Toomer, Mayor
Town of Bluffton, South Carolina

ATTEST:

Marcia Hunter, Town Clerk
Town of Bluffton, South Carolina

TOWN OF BLUFFTON AGREEMENT
Contract Number 2022-35

COUNTY OF BEAUFORT

STATE OF SOUTH CAROLINA

THIS AGREEMENT is made the 24th of June, 2022 between Hilton Head Island – Bluffton Chamber of Commerce (hereinafter called “Chamber”) and the Town of Bluffton (hereinafter called “Town”), a municipal corporation organized and existing under the laws of the State of South Carolina.

WHEREAS, the Town is a recipient of an allocation of State accommodations tax revenues (“ATAX”) as defined in South Carolina Code (“S.C.C.”) Section 6-4 which must be allocated to a special fund and used only for advertising and promotion of tourism to develop and increase tourist attendance through the generation of publicity.

WHEREAS, Chapter 24 of the Bluffton Code of Ordinances allows for locally generated ATAX to be used for advertisements and promotions related to tourism development.

WHEREAS, S.C.C. 6-4 and Chapter 24 of the Bluffton Code of Ordinances specify that one or more organizations may be selected to receive these funds to further such advertisement and promotions so long as they meet specific criteria, including but not limited to: being organized as a non-profit organization employing a full-time executive director, submit an annual budget of planned expenditures, and provide an annual audited financial report generated in accordance with Generally Accepted Accounting Principles (“GAAP”).

WHEREAS, the Town desires to enter into an Agreement with a non-profit who meets all of the statutory criteria for the purpose of advertising and promotion of tourism to develop and increase tourist attendance within the Town of Bluffton;

WHEREAS, the Town published a Request for Proposal detailing a scope of work, deliverables and specific schedule, and the Chamber responded thereto, and

WHEREAS, the Town and Chamber desire to enter into an Agreement wherein the Chamber shall provide such services as set forth herein and described in their Request for Proposal response 2022-35.

NOW, THEREFORE, for and in consideration of the mutual promises, undertaking and covenants set forth herein, the receipt and sufficiency of which are acknowledged and affirmed by the Town and the Chamber, the parties hereto agree as follows:

1. Chamber Obligations.

1.1 **Audit.** The Chamber agrees to provide an independent auditor’s financial report to the Town on an annual basis for each fiscal year it is under contract. Fiscal year runs July 1 to June 30. The audit shall be delivered to the Town no later than November 15 after the applicable fiscal year ends.

The following standards shall apply to the audit and/or the auditor:

- (a) The audit shall be conducted in conformity with the statements, rules, policies, and procedures set forth by the American Institute of Certified Public Accountants (“AICPA”).
- (b) The audit shall be performed in accordance with generally accepted auditing standards (“GAAS”).
- (c) The auditor must comply with all applicable statement on auditing standards (“SAS”) that are issued by the Auditor’s Standing Board of the AICPA.
- (d) The auditor must maintain malpractice insurance in an amount equal to at least One Million dollars (\$1,000,000.00).
- (e) The auditor must provide evidence of successful completion of the peer review process approved by the AICPA.

- 1.2 DMO Report. On a quarterly basis, the Chamber shall produce and deliver to the Town a schedule of revenues and expenses incurred to date for each fiscal year ("the Report") for the designated marketing organization division of the Chamber ("DMO"). The DMO revenue shall include all accommodation tax revenue received from the Town and/or the State of South Carolina. This Report shall be produced under the standards set forth above in Section 1.1(a), (b), and (c) and by the same auditor that has satisfied the standards set forth above in Section 1.2(d) and (e). The Quarterly Reports shall be delivered to the Town within 45 calendar days following October 1, January 1, and April 1, and the Annual Report with cumulative data no later than November 15 after the applicable fiscal year ends.
- 1.3 ATAX Disbursements. The Chamber shall manage and direct the expenditure of any ATAX monies disbursed to them, whether State or local in origin. In addition, the Chamber shall be eligible to apply for annual supplemental grants from the accommodation tax pool and from the emergency reserve fund established by the Town. All public funds received by the Chamber shall be subjected to the auditing and reporting requirements of this Agreement.
- 1.4 Process. The Chamber shall submit a budget of planned expenditures and a marketing plan ("MP") for the ATAX disbursement for each fiscal year. The MP shall be recommended by the Chamber's marketing professionals and the MP and the budget shall be approved by the Board of Directors of the Chamber. The budget and MP will then be submitted to the Town prior to April 1, and the Town's accommodations tax committee ("ATAC") will review and make recommendation to Town Council. Upon the recommendation by the ATAC, the budget and MP shall be forwarded for approval to Town Council before the beginning of the fiscal year.
- 1.5 Inspection Rights. The Chamber shall provide access, upon reasonable notice, to the Town Manager or his designee who possesses sufficient financial acumen to inspect the necessary financial records, including third party invoices, of the Chamber in order to verify compliance of the Report in all material respects. This inspection right may be invoked twice per year.
- 1.6 Website. The Chamber shall maintain a website that is unique to Bluffton which shall remain the work product of the Town under an open Content Management System platform. The design and functionality of the website should be responsive in a variety of environments including desktop, tablet, and mobile device. The Chamber will measure website traffic and maintain a comprehensive Search Engine Optimization plan.

2. Performance Standards.

2.1 Industry Metrics. The Chamber shall provide the Town with certain tourism metrics and/or reports such as:

- (a) Revenue per available room;
- (b) Occupancy rates;
- (c) Visitor spending studies;
- (d) Return on investment for visitor spending per dollar of investment;
- (e) Local tax revenues generated by visitors;
- (f) Number of visitors;
- (g) Number of referrals made to area businesses and number of website hits and click throughs made to area businesses;
- (h) Numbers related to mail fulfillment and other contacts;
- (i) Industry awards received for marketing and public relations efforts;
- (j) Number of jobs created by tourism;
- (k) Events held and participation in events by Chamber members; and
- (l) Update on public relations efforts to include number of media impressions and dollar equivalent for the media impressions.

The content and format of the Industry Metrics report may change from time to time at the discretion of the Town and in accordance with activities planned in the Marketing Report. The Industry Metrics reports shall be submitted quarterly within 45 calendar days following October 1, January 1, April 1 and July 1. The Industry Metrics report shall also include year over year metrics as available.

- 2.2. **Key Performance Indicators.** The Town shall use the Industry Metrics reports to evaluate the performance of the Chamber against the objectives stated in the Marketing Plan, resulting in an evaluation of Key Performance Indicators ("KPIs"). Such evaluation shall take into account outside effects on tourism such as the state of the economy, weather, etc. In the event that the Town, in its sole discretion, determines that the Chamber is not meeting the objectives of the Key Performance Indicators, it shall work with the Chamber on a remedial plan to cure the deficiencies. If the Chamber does not meet the objectives and deadlines of the remedial cure plan, the Town shall have the right to provide written notice of contract termination.

3. **Chamber Covenants and Representations.**

- 3.1 The Chamber covenants and represents that it has all necessary licenses, permissions and authority to enter into this Agreement.
- 3.2 The Chamber covenants and represents to perform all tasks required under this Agreement with a degree of skill and care of reputable organizations of the same profession nationally.
- 3.3 The Chamber covenants and represents to properly withhold from all wages, commissions, salaries, and fees paid by the Chamber to third parties or employees, agents, or subcontractors of the Chamber all amounts required by state or federal law to be withheld for or on account of taxes, social security payments, or other withholdings mandated by law or regulation.
- 3.4 The Chamber covenants and represents that it shall maintain the appropriate amounts and coverages of insurance for general liability, auto liability, and workers compensation as determined by the Town for the entire length of the Agreement. The Chamber must provide the Town with a Certificate of Insurance that names the Town as an additional insured on their general liability policy. The Chamber is required to immediately contact the Town should any change to these policies occur during the course of the performance of this contract.
- 3.5 The Chamber covenants and represents that it shall comply with the most current Federal and State of South Carolina Laws and Regulations, including but not limited to, Fair Labor Standards Act of 1938, Title VII of the Civil Rights Act of 1964, Americans with Disabilities Act of 1990, the South Carolina Wage Act, the South Carolina Worker's Compensation Act, all laws related to the South Carolina Accommodation Tax, and all Town of Bluffton Ordinances.
- 3.6 The Chamber covenants and represents that the MP shall include a public relations plan and a social media plan, including development and maintenance of the Town of Bluffton tourism web site.

4. **Town Covenants and Representations.**

- 4.1 The Town hereby covenants and represents that it will comply with all state and local accommodation tax laws and ordinances in administering all such funds to the Chamber and other non-profit organizations.
- 4.2 The Town hereby covenants and represents that it shall comply with all such laws and procedures in a manner not to discriminate against one non-profit versus another non-profit.
- 4.3 The Town hereby covenants and represents that it shall pass a resolution no later than June 30 of the preceding fiscal year allocating the funding for the upcoming fiscal year.
- 4.4 The Town hereby covenants and represents that it shall cause the funding to be paid quarterly to the Chamber for the budget and MP to be implemented. Quarterly payments will be made within 5 days of receipt of quarterly State ATAX proceeds.
- 4.5 The Town hereby covenants and represents not to disturb, violate, request to be violated, any laws, loan covenants, policies and procedures, including but not limited to all federal and state laws, and the South Carolina Non-Profit Act which effect the Chamber.

4.6 The Town hereby covenants and represents that the Town has lawful authority required under State law and Town ordinances to enter into and perform this Agreement.

5. **Term.** This Agreement shall be effective July 1, 2022 and shall continue for a period of three (3) years with an option to renew for another two (2) year term unless otherwise terminated as provided herein. Each party retains the right to terminate this Agreement in accordance with Section 6.

6. **Termination.**

6.1 **For Cause.** If the Performance Standards have not been met, and the Chamber has not cured in accordance with Section 2.2, the Town may terminate this Agreement by providing ninety (90) day notice to the Chamber. In the event the auditor determines fraud has occurred, the Town may terminate this Agreement immediately.

6.2 **For Convenience.** Each party shall have the ability to terminate the Agreement by providing the other party 90 days' written notice.

7. **Other Provisions.**

7.1 **Headings.** Headings to paragraphs in this Agreement shall not interpret or alter the meaning of the words in the respective paragraph, nor any other provision of this Agreement.

7.2 **Notices.** All notices to each party shall be in writing and sent as follows:

Town:
Town of Bluffton
ATTN: Stephen Steese, Town Manager
PO Box 386
20 Bridge Street
Bluffton, SC 29910

Chamber:
Hilton Head Island – Bluffton Chamber of Commerce
ATTN: William G. Miles
PO Box 5647
Hilton Head Island, SC 29938

7.3 **Jurisdiction.** This Agreement has been made and entered into in the State of South Carolina, and the laws of South Carolina shall govern the validity and interpretation of this Agreement in the performance due hereunder.

7.4 **Independent Contractor Status.** The Chamber shall not, by entering into this Agreement, become a servant, agent, or employee of the Town, but shall remain at all times and independent contractor. This Agreement shall not be deemed to create any joint venture, partnership, or common enterprise between the Chamber and the Town, and the rights and obligations of the parties shall not be other than as expressly set forth herein.

7.5 **Attorney's Fees, Dispute Resolution.** In the event of a dispute between the parties, the prevailing party in any dispute shall be entitled to an award of all reasonable attorneys and costs.

IN WITNESS WHEREOF, the parties hereto affixed their signatures hereto the date first written hereinabove.

HILTON HEAD – BLUFFTON CHAMBER OF COMMERCE

TOWN OF BLUFFTON

Date: 6-14-2022

Date: 6/24/2022

By: William G. Miles

By: Heather L. Colin

Print Name: William G. Miles

Print Name: Heather Colin

Position: PRESIDENT & CEO

Position: Assistant Town Manager

Witnesses: Connie Gill

Witnesses: _____

Bluffton / Southern Beaufort County Budget (FY2024-2025)

	FY2025 VCB TOTALS	FY2025 BLUFFTON (49%)	FY2025 SBC (51%)
REVENUES	Bluffton & SBC		
Town of Bluffton DMO	\$350,000	\$350,000	
Southern Beaufort County DMO	\$365,000		\$365,000
Total Revenues	\$715,000		
EXPENSES			
Digital Promotions / SEM	\$43,475	\$21,303	\$22,172
Website Maintenance	\$30,000	\$14,700	\$15,300
Website Hosting	\$2,400	\$1,176	\$1,224
Social Marketing & Content Strategy	\$30,000	\$14,700	\$15,300
Paid Social	\$72,000	\$35,280	\$36,720
SEO	\$20,000	\$9,800	\$10,200
Bluffton Insiders (enews)	\$20,000	\$9,800	\$10,200
Bluffton Vacation Planner/Fulfillment	\$125,000	\$61,250	\$63,750
Regional Vacation Planner/Fulfillment	\$44,000	\$21,560	\$22,440
Media Partnerships	\$25,000	\$12,250	\$12,750
Photography/Videography	\$10,000	\$4,900	\$5,100
Research & Planning	\$20,000	\$9,800	\$10,200
Contingency	\$5,000	\$2,231	\$2,769
Ops & Management	\$268,125	\$131,250	\$136,875
TOTAL EXPENSES	\$715,000	\$350,000	\$365,000

Recommendation of Motion

Consideration to Approve a Resolution for the FY2025 Budget and Marketing Plan presented by the Hilton Head Island-Bluffton Chamber of Commerce in accordance with contract 2022-35 as the Town of Bluffton's Designated Marketing Organization.

"I make a motion to approve a resolution for the FY2025 Budget and Marketing Plan presented by the Hilton Head Island-Bluffton Chamber of Commerce in accordance with contract 2022-35 as the Town of Bluffton's Designated Marketing Organization."

TOWN COUNCIL



STAFF REPORT
Finance & Administration Department

MEETING DATE:	June 11, 2024
PROJECT:	Consideration of an Ordinance Amending the Town of Bluffton Code of Ordinances, Chapter 24, Taxation – Second Reading
PROJECT MANAGER:	Natalie Majorkiewicz, CGFO, Director of Finance & Administration

REQUEST:

Town Council consider approval of first reading of the proposed ordinance amending Town of Bluffton Code of Ordinance, Chapter 24, Taxation with the following two changes:

1. Change the word “all” to “state” contained in the second sentence of Chapter 24, Article II, Division 1, Sec. 24-19, paragraph (a) “...*the Accommodations Tax Advisory Committee shall make recommendations to Town Council concerning the expenditure of revenue generated from ~~all~~ state accommodations tax in accordance with and subject to the provisions and allocations set forth in this article...*”
2. Remove what is currently in paragraph (c) *Operations and maintenance* of Chapter 24, Article II, Division 2, Sec. 24-26 – Management and use of local accommodations tax and move paragraph (d) *Reserve fund* to (c) to replace it.

BACKGROUND:

This amendment addresses two main items:

1. Accommodations Tax Advisory Committee (ATAC)

In accordance with S.C. Code 1976 § 6-4-25, Advisory Committee; guidelines for expenditures; annual reports; reports to Accommodations Tax Oversight Committee, “*A municipality or county receiving more than fifty thousand dollars in revenue from the accommodations tax in county areas collecting more than fifty thousand dollars shall appoint an advisory committee to make recommendations on the expenditure of revenue generated from the accommodations tax.*”

Additionally, in S.C. Code Title 6 – Local Government, Chapter 1 – General Provisions, Article 5 – Local Accommodations Tax, there is not the requirement for ATAC’s oversight that’s stated in Chapter 4 – Allocation of Accommodations Tax Revenues pertaining to South Carolina tax on accommodations.

On March 20, 2007, the Town of Bluffton moved, approved, and adopted the establishment of the required advisory committee by resolution. On June 11, 2019, Town Council amended the Ordinance to include ATAC within the Town of Bluffton Code of Ordinance due to the longevity and the significance as the committee is required by State Law.

Currently our Town Code Chapter 24, Article II, Division 1, Sec. 24-19 – Accommodations Tax Advisory Committee; Establishment, paragraph (a) contains the following:

*“The Town hereby ratifies and confirms the establishment of the Accommodations Tax Advisory Committee to perform such duties and functions as are required or authorized by the Town Council and/or State law. In particular, the Accommodations Tax Advisory Committee shall make recommendations to Town Council concerning the expenditure of revenue generated from **all accommodations tax** in accordance with and subject to the provisions and allocations set forth in this article and any guidelines adopted by the Town and the Accommodations Tax Advisory Committee membership.”*

The wording notes “all accommodations tax” which is contrary to wording in Division 2, Sec. 24-26 – Management and use of local accommodations tax, paragraph (a), General Allocations within the same Article II, that states:

“Authorization to utilize any funds from the local accommodations tax account shall be by the annual budget ordinance duly adopted by Town Council, as the same may be amended from time to time.”

2. Edits in Chapter 24 – Taxation, Division 2, Sec. 24-26 – Management and use of local accommodations tax, Paragraph (c) Operations and maintenance

In the proposed FY2025 Town of Bluffton Budget, there are allocations to support the General Fund from the Local Accommodations Tax Fund that exceed the limit noted in paragraph (c) of up to ten percent.

The FY2025 proposed budget includes a transfer from the Local Accommodations Tax Fund to the General Fund of \$536,059 to support for the following:

- 15% for Workforce Housing initiatives
- Special events
- Community programs
- Town of Bluffton Welcome Center projected to open January 1, 2025

NEXT STEPS:

Process	Date	Step Completed
Town Council Ordinance Amendment – 1 st Reading	May 14, 2024	✓
ATAC Meeting	May 21, 2024	✓
Town Council Ordinance Amendment – 2 nd Reading	June 11, 2024	✓

SUMMARY:

This is Second Reading of the proposed ordinance amending the Town of Bluffton Code of Ordinance, Chapter 24, Article II to clarify the confusion between Divisions 1 and 2 regarding ATAC's responsibility pertaining to local accommodations taxes and removes the ten percent limit of local accommodations tax support in the General Fund.

ATTACHMENTS:

1. Proposed Ordinance Chapter 24 – Taxation
2. Markup of existing Ordinance Chapter 24 – Taxation, Article II – Accommodations Tax with amendments
3. Regional Comparison
4. Recommended Motion

ORDINANCE NO. 2024 - ____**TOWN OF BLUFFTON, SOUTH CAROLINA****AN ORDINANCE AMENDING CHAPTER 24, *TAXATION* OF THE TOWN CODE OF ORDINANCES**

WHEREAS, the Town of Bluffton desires to improve the general safety, welfare, health and properties of the citizens of the Town of Bluffton; and,

WHEREAS, to establish the necessary provisions to accomplish the above, the Town of Bluffton has the authority to enact resolutions, ordinances, regulations, and procedures pursuant to Section 5-7-30 of the South Carolina Code of Laws, 1976, as amended; and,

WHEREAS, the Town of Bluffton Town Council shall from time to time examine ordinances to ensure that they are properly regarded, enforced, sufficient and satisfactory to the needs of the community and can further suggest amendments as Town Council deems appropriate; and,

WHEREAS, the Town of Bluffton Town Council desires to amend Chapter 24, *Taxation*, to include updating the language in Section 24-19, Accommodations Tax Advisory Committee; establishment to clarify recommendations to Town Council concerning the expenditure of revenue generated from state accommodations tax in Division 1 of Article II, removing paragraph c *Operations and maintenance* from Sec. 24-26, Management and use of local accommodations tax of Division 2 in Article II and moving paragraph d *Reserve fund* up to c.

NOW, THEREFORE, BE IT ORDERED AND ORDAINED BY THE TOWN COUNCIL OF THE TOWN OF BLUFFTON, SOUTH CAROLINA, in accordance with the foregoing, the Town hereby amends the Code of Ordinances for the Town of Bluffton as follows:

SECTION 1. AMENDMENT. The Town of Bluffton hereby amends Chapter 24, *Taxation*, of the Code of Ordinances for the Town of Bluffton, South Carolina, to amend the ordinance to include a language update, removal of a paragraph and a relabel of a paragraph, as shown on Attachment 2 attached hereto and fully incorporated herein by reference.

SECTION 2. REPEAL OF CONFLICTING ORDINANCES. All ordinances or parts of ordinances that are inconsistent with this Ordinance are hereby repealed to the extent of such inconsistency.

SECTION 3. ORDINANCE IN FULL FORCE AND EFFECT. This entire Ordinance shall take full force and effect upon adoption.

DONE, RATIFIED AND ENACTED this ____ day of _____, 2024.

This Ordinance was read and passed at first reading on May 14, 2024.

 Larry Toomer, Mayor
 Town of Bluffton, South Carolina

 Marcia Hunter, Town Clerk
 Town of Bluffton, South Carolina

This Ordinance was read and passed at final reading on _____, 2024.

 Larry Toomer, Mayor
 Town of Bluffton, South Carolina

 Marcia Hunter, Town Clerk
 Town of Bluffton, South Carolina

- CODE OF ORDINANCES
Chapter 24 - TAXATION
ARTICLE II. ACCOMMODATIONS TAX

ARTICLE II. ACCOMMODATIONS TAX¹

DIVISION 1. GENERAL

Sec. 24-18. Definitions.

Except where the context otherwise requires, the definitions set forth in this section shall govern the construction of this article:

Accommodation shall mean a room or rooms, campground space, lodging, or other sleeping accommodations furnished to transients by any hotel, inn, tourist camp, tourist court, motel, campground, residence, bed-and-breakfast, vacation rental, or any other place in which rooms, lodgings, or sleeping accommodations are furnished to transients for consideration, whether with or without meals.

Accommodations tax means a tax imposed on the gross proceeds derived from the rental or charges for any accommodation furnished to transients and which is imposed on every person engaged or continuing within the Town the business of furnishing accommodations to transients for any consideration.

Additional guest charge shall mean a charge or fee imposed upon a transient for:

- (1) Room service;
- (2) Laundering or dry cleaning service;
- (3) In-room movies;
- (4) Telephone service; and/or
- (5) Rental of meeting rooms.

Charge shall mean any and all related markup, service fee, convenience fee, facilitation fee, cancellation fee, late departure fee, and other such charge, regardless of terminology, assessed in conjunction with the rental of an accommodation. The term "charge" shall not include additional guest charges.

Designated marketing organization (DMO) shall mean a qualified nonprofit organization with either an existing, ongoing tourist promotion program or that has demonstrated the capabilities of developing an effective tourist promotion program that has been designated by Town Council as a designated marketing organization in accordance with the provisions of this article and State law.

Gross proceeds shall mean the gross amount of consideration for the use or privilege of using an accommodation in the Town, valued in money, whether received in money or otherwise, including cash, credits, property and services, determined without any deduction for costs or expenses whatsoever, and shall include any and all charges that the transient pays incidental to obtaining the use or privilege of using an accommodation;

¹Editor's note(s)—Ord. No. 2019-09 , § 1(Att. 2), adopted June 11, 2019, amended Article II in its entirety to read as herein set out. New sections were added, subsequently renumbering §§ 24-20 and 24-21 as 24-21 and 24-22. Former § 24-22 was incorporated into § 24-23. For a more detailed description please see the code comparative table. The historical notation remains with the amended sections.

State law reference(s)—Local accommodations tax, S.C. Code of 1976 § 6-1-500 et seq.

provided, however, the term "gross proceeds" shall not include charges that are assessed to the taxpayer on account of the tax imposed by this chapter or on account of any other tax imposed on the charge or fee.

Tourist shall mean 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.

Transient shall mean any person who exercises occupancy or is entitled to occupancy in an accommodation for a period of 90 consecutive calendar days or less, counting portions of calendar days as full days. The day an occupant checks out of an accommodation shall not be included in determining the 90-day period if the occupant is not charged a rental fee or charge for that day by the operator. Any such occupant of an accommodation shall be deemed to be a transient until the period of 90 days has expired, unless there is an agreement in writing between the operator and the occupant providing for a longer period of occupancy. In determining whether a person is a transient, uninterrupted periods of time extending both prior and subsequent to the effective date of the ordinance codified in this chapter may be considered.

(Ord. No. 2019-09 , § 1(Att. 2), 6-11-2019)

Sec. 24-19. Accommodations Tax Advisory Committee; establishment.

- (a) The Town hereby ratifies and confirms the establishment of the Accommodations Tax Advisory Committee to perform such duties and functions as are required or authorized by the Town Council and/or State law. In particular, the Accommodations Tax Advisory Committee shall make recommendations to Town Council concerning the expenditure of revenue generated from state accommodations tax in accordance with and subject to the provisions and allocations set forth in this article and any guidelines adopted by the Town and the Accommodations Tax Advisory Committee membership.
 - (1) The Accommodations Tax Advisory Committee shall be appointed by Town Council and whose composition and membership shall be composed in accordance with State law and this Code.
 - (2) *Term and meetings.*
 - a. The Accommodations Tax Advisory Committee, in conjunction with Town Council, shall adopt guidelines to fit the needs and time schedules of the Municipality, which guidelines shall include the requirements for applications for funds from the special accommodations tax fund that are to be used for tourism-related expenditures as defined by State law and this Code.
 - b. Meetings of the Accommodations Tax Advisory Committee shall be conducted in accordance with Chapter 3 of the Town Code and any such Rules of Procedure adopted by the Accommodations Tax Advisory Committee.
- (b) *Powers and duties.*
 - (1) The Accommodations Tax Advisory Committee shall review all applications for funds from the special fund(s) used for tourism-related expenditures created pursuant to this article and/or State law and shall submit written recommendations to Town Council at least once annually regarding the expenditure of such accommodation tax funds. The recommendations must be considered by Town Council in conjunction with the requirements of S.C. Code of 1976 § 6-4-5, et seq.
 - (2) The Accommodations Tax Advisory Committee shall also review and evaluate all tendered responses and contracts received by the Town pursuant to any request for proposals or other procurement initiatives regarding the Town Council's designation of one or more designated marketing organizations and shall advise Town Council regarding the designation of the same and the award of any contract to one or more designated marketing organizations up to a three-year term without an automatic renewal for additional terms.

- (3) No applicant may receive funds from the special accommodations tax fund unless such applicant's application has been first reviewed by the Accommodations Tax Advisory Committee.

(Ord. No. 2019-09 , § 1(Att. 2), 6-11-2019)

Sec. 24-20. Designated marketing organization.

- (a) *Designation by Town Council.* In accordance with S.C. Code of 1976 § 6-4-10(3), the Town Council shall designate one or more qualified nonprofit organizations as a designated marketing organization for the purpose of managing and directing the expenditure of certain tourism promotion funds to be allocated to the designated marketing organization pursuant to State law or this article.
- (b) *Criteria for eligibility.* To be eligible for selection as a designated marketing organization, the organization must be local, organized and operated for exempt purposes as a nonprofit with 501(c) status, and whose membership predominantly consists of representatives from the lodging, restaurant, golf, tennis, and/or related hospitality industry. The organization must employ a full-time Executive Director and provide an annual audited financial report in accordance with Generally Accepted Accounting Principles (GAAP).
- (c) *Annual budget.* All designated marketing organizations are required to submit for approval an annual budget of planned expenditures. The proposed budgets shall be submitted to the Town prior to April 1 for review by the Town's Accommodations Tax Advisory Committee. At the end of each fiscal year, designated marketing organization receiving funds pursuant to this section shall render to the Town an accounting of all such expenditures by no later than November 1.
- (d) *Contracting with designated marketing organization.* To better ensure that any designated marketing organization is complying with the intent of this article, Town Council may enter into one or more non-exclusive contracts with such designated marketing organization prior to or contemporaneously with the allocation of any accommodation tax revenue to such designated marketing organization.

(Ord. No. 2019-09 , § 1(Att. 2), 6-11-2019)

DIVISION 2. LOCAL ACCOMMODATIONS TAX

Sec. 24-21. Declaration of purpose and intent; establishment of local accommodations tax.

This article is enacted to preserve the general health, safety, and welfare of the general public within the Town by enacting a three percent local accommodations tax to be collected for the purpose of creating an additional source of funding to pay, in whole or in part, for the current and future needs of the Town in compliance with S.C. Code of 1976 § 6-1-500, et seq.

(Ord. No. 2007-11, art. II, 8-21-2007; Ord. No. 2019-09 , § 1(Att. 2), 6-11-2019)

Sec. 24-22. Tax rate.

- (a) *Tax imposed.* A local accommodations tax equal to three percent is hereby imposed on the gross proceeds derived from the rental or charges for any accommodations within the Town.
- (b) *Exemptions.* A local accommodations tax shall not apply to the gross proceeds from the rental or charges for accommodations that are exempt from the State accommodations tax pursuant to the State Code.

(Ord. No. 2007-11, art. III, 8-21-2007; Ord. No. 2019-09 , § 1(Att. 2), 6-11-2019)

Sec. 24-23. Collection and payment of the local accommodations tax; remittance.

- (a) *Payment of local accommodations tax.* The ultimate incidence of and liability for payment of the local accommodation tax shall be borne by the occupant of any such accommodation. The accommodation tax herein levied shall be in addition to any and all other taxes. It shall be the duty of every owner, manager or operator of an accommodation to secure said accommodation tax from the occupant of said accommodation and pay over to the Town said accommodation tax under rules and regulations prescribed by the Town and as otherwise provided by this article. The local accommodations tax shall be paid at the time of delivery of the services to which the local accommodations tax applies, and shall be collected by the provider of the services.
- (b) *Collection of local accommodations tax.* The local accommodation tax herein levied shall be secured by the owner, manager or operator of the accommodation from the transient when collecting the price, charge or rent to which it applies. The accommodation tax shall be paid to the person required to collect it as trustee for and on behalf of the Town.
- (c) *Remittance.* The local accommodations tax collected by the provider of the services as required in this section shall be remitted to the Town on a monthly basis when the estimated amount of average tax is more than \$50.00 a month, on a quarterly basis when the estimated amount of average tax is \$25.00 to \$50.00 a month, and on an annual basis when the estimated amount of average tax is less than \$25.00 a month. Payments are due on or before the 20th day following the end of the filing period.
- (d) *Remittance forms.* The Town shall promulgate a form of remittance which shall be utilized by the remitter of the local accommodation tax to calculate the amount of local accommodation tax collected and due for each period. Said form shall contain a sworn declaration as to the correctness thereof by the remitter, and shall be accompanied by the payment due to the Town. Failure to receive notice shall not constitute a defense to prosecution for failure to pay the tax due or grounds for waiver of penalties.

(Ord. No. 2007-11, arts. IV, V, 8-21-2007; Ord. No. 2019-09 , § 1(Att. 2), 6-11-2019)

Sec. 24-24. Local accommodations tax account.

- (a) An interest-bearing, restricted account to be known as the Town "local accommodations tax account" is hereby established and all revenues received from the local accommodations tax shall be deposited into this account. The account shall be controlled by the Town Manager or his designee. The principal and any accrued interest thereon shall be spent only as provided in this article.
- (b) Deposits into the local accommodations tax account may also include appropriations from the general fund by the Town Council and voluntary contributions of money and other liquid assets from any source. Once any such funds are deposited into the local accommodations tax account, the funds become dedicated funds and may only be spent as provided in this article.

(Ord. No. 2007-11, art. VI, 8-21-2007; Ord. No. 2019-09 , § 1(Att. 2), 6-11-2019)

Sec. 24-25. Permitted uses of local accommodations tax funds.

The Town Council is hereby authorized to utilize the funds collected from the imposition and collection of the local accommodations tax and any other funds deposited into the local accommodations tax account exclusively for the following purposes:

- (1) Tourism-related buildings, including, but not limited to, civic centers, coliseums, and aquariums;

- (2) Tourism-related cultural, recreational, or historic facilities;
- (3) Beach access, renourishment, or other tourism-related lands and water access;
- (4) Highways, roads, streets, bridges, and boat ramps providing access to tourist destinations;
- (5) Advertisements and promotions related to tourism development;
- (6) Water and sewer infrastructure to serve tourism-related demand;
- (7) The operation and maintenance of those items provided in this section, including police, fire protection, emergency medical services, and emergency preparedness operations directly attendant to those facilities; and
- (8) Any such other purpose permitted by State law.

(Ord. No. 2007-11, art. VII, 8-21-2007; Ord. No. 2019-09 , § 1(Att. 2), 6-11-2019)

Sec. 24-26. Management and use of local accommodations tax.

- (a) *General allocations.* Authorization to utilize any funds from the local accommodations tax account shall be by the annual budget ordinance duly adopted by Town Council, as the same may be amended from time to time.
- (b) *Designated marketing organization.* The Town may set aside an amount not to exceed eight percent of this local accommodations tax revenue for allocation to a special fund for the designated marketing organization(s) to be used only for advertising and promotion of tourism to develop and increase tourist attendance through the generation of publicity in accordance with this article. Any funds from this special fund to one or more designated marketing organization shall be distributed on a quarterly basis no later than 30 days after the end of the quarter. Funds awarded hereunder must only be used for advertising and promotion of tourism to develop and increase tourist attendance through the generation of publicity, and not used to pledge as security for bonds and to retire bonds.
- (c) *Reserve fund.* The Town may set aside, up to one percent of the local accommodations tax revenue deposited into the local accommodations tax account as a reserve fund for disaster management communications-oriented programs as a result of hurricanes, floods, or other natural or manmade disasters. Fund expenditures shall be used to provide for post-disaster advertising, a communications link to emergency agencies, and media programs to provide public notice. Funds may be distributed upon authorization by the Town Manager.

(Ord. No. 2007-11, art. VIII, 8-21-2007; Ord. No. 2019-09 , § 1(Att. 2), 6-11-2019)

Sec. 24-27. Inspections and audits.

- (a) For the purpose of enforcing the provisions of this article, the Town Manager or his designee is empowered to enter upon the premises of any person or entity subject to the provisions of this article and to make inspections, examine, and audit the books and records of such person or entity.
- (b) It shall be unlawful for any person to fail or refuse to make available the necessary books and records during normal business hours upon 24 hours' written notice. In the event that an audit reveals that false information has been provided by the remitter, the cost of the audit shall be added to the correct amount of local accommodations taxes determined to be due. This shall be in addition to any other fines or penalties provided by this article and/or the Code. The Town Manager or his designee may make systematic inspections of all establishments within the Town to ensure compliance with this article.

- (c) Records of any such inspection shall not be deemed public records in accordance with S.C. Code of 1976 § 6-1-120, as amended.

(Ord. No. 2007-11, art. IX, 8-21-2007; Ord. No. 2019-09 , § 1(Att. 2), 6-11-2019)

Sec. 24-28. Violations and penalty.

- (a) It shall be a violation of this article to:
- (1) Fail to collect the local accommodations tax as set forth in this article;
 - (2) Fail to remit to the Town any local accommodations taxes collected pursuant to this article by the due date thereof, as set forth in this article;
 - (3) Knowingly provide false information on any return submitted to the Town as set forth in this article; or
 - (4) Fail or refuse to provide books and records to the Town Manager or his designee upon 24 hours' written notice, as provided for in this article.
- (b) Upon conviction for a violation hereof, the violator shall be guilty of a misdemeanor punishable as provided in Section 1-7 of this Code.
- (c) In the event local accommodations taxes are not timely remitted to the Town as set forth in this article, the person or establishment failing to remit shall also pay a penalty of five percent of the unpaid amount for each month or portion thereof until said local accommodations taxes are paid in full.
- (d) Upon identification of a delinquent account, the Town Manager or his/her designee has the authority to establish payment plans, revenue procedures, and reduce or waive penalties based on the revenue procedures as adopted with this amendment.

(Ord. No. 2007-11, art. X, 8-21-2007; Ord. No. 2019-09 , § 1(Att. 2), 6-11-2019)

DIVISION 3. STATE ACCOMMODATIONS TAX

Sec. 24-29. State accommodations tax account.

- (a) The Town Council shall provide for the use and administration of all monies received from the State through the accommodations tax program pursuant to S.C. Code of 1976 § 12-36-920, et seq., and S.C. Code of 1976 § 6-4-5, et seq.
- (b) An interest-bearing, restricted account to be known as the Town "state accommodations tax account" is hereby established and, except as otherwise provided herein, all revenues received from the State accommodations tax shall be deposited into this account. The account shall be controlled by the Town Manager or his designee. The principal and any accrued interest thereon shall be spent only as provided in this article.

(Ord. No. 2019-09 , § 1(Att. 2), 6-11-2019)

Sec. 24-30. Management and use of State accommodations tax revenue.

- (a) *General fund.* In accordance with S.C. Code of 1976 §§ 6-4-10(1) and (2), the first \$25,000.00 of accommodations tax revenue and five percent of the balance of the accommodations tax revenue received

by the Town from the State Department of Revenue shall be allocated to the general fund of the Town and is exempt from all other requirements of this article.

- (b) *Designated marketing organization.* In accordance with S.C. Code of 1976 § 6-4-10(3), following the allocation of certain accommodations tax revenue to the Town's general fund as provided for in the foregoing subsection (a), the Town shall allocate 30 percent of the remaining balance of the accommodations tax revenue received by the Town from the State Department of Revenue to a special fund for one or more designated marketing organizations to be used only for advertising and the promotion of tourism to develop and increase tourist attendance through the generation of publicity in accordance with this article. Immediately upon an allocation of the accommodation tax revenue to the aforementioned special fund, the Town shall distribute the tourism promotion funds to the applicable designated marketing organization(s).
- (1) In accordance with South Carolina State Law, the designated marketing organization(s) shall submit for approval an annual budget of planned expenditures. The proposed budget(s) shall be submitted to the Town prior to April 1.
 - (2) At the end of each fiscal year, designated marketing organization receiving funds pursuant to this section shall render to the Town an accounting of all such expenditures by no later than November 1.
 - (3) Funds allocated hereunder must only be used for advertising and promotion of tourism to develop and increase tourist attendance through the generation of publicity, and not used to pledge as security for bonds and to retire bonds.
- (c) The remaining balance, plus earned interest, received by the Town from the State Department of Revenue shall be allocated to the State accommodations tax account and shall be used for tourism-related expenditures and such other expenditures as permitted by S.C. Code of 1976 § 6-4-10(4).

(Ord. No. 2019-09 , § 1(Att. 2), 6-11-2019)

Secs. 24-31—24-59. Reserved.

Regional Comparison for Grant Applications

	Type of Grant Application	Review/ Recommendation	Timeframe	Deadline
Beaufort County	State	ATAC	Annual	3-Nov
	Local	Staff > Finance Committee > County Council	Annual	31-May
City of Beaufort	State	TDAC Tourism Development Advisory Committee	Annual	1-Sep
Town of Hilton Head Island	State	ATAC	Annual	1-Sep
City of Port Royal	State	ATAC	Annual	April
City of Charleston	State	ATAC	Annual	July
Town of Bluffton (Current)		ATAC	Quarterly	Last Day of March, June, September, and December by noon.

Council Motion Recommendation

Consideration of an Ordinance Amending the Town of Bluffton Code of Ordinances, Chapter 24, Taxation – Second Reading

"I make a motion to approve the Ordinance Amending the Town of Bluffton Code of Ordinances, Chapter 24, Taxation as presented."

TOWN COUNCIL



STAFF REPORT
Finance & Administration Department

MEETING DATE:	June 11, 2024
PROJECT:	Consideration of Accommodations Tax Advisory Committee Funding Recommendations for Quarter Ending March 31, 2024
PROJECT MANAGER:	Natalie Majorkiewicz, CGFO, Director of Finance & Administration

REQUEST:

Town Staff requests Town Council to consider the Accommodations Tax Advisory Committee’s (ATAC) recommendations for grant awards as presented below:

Requesting Organization	Amount Requested	Amount Recommended
Society of Bluffton Artists: 30 th Year Anniversary	\$ 20,000	\$ 20,000
Hilton Head Symphony Orchestra: 2024 Bluffton Concerts	43,632	43,632
BlacQuity SC: 2024 Roots & Rivers Festival	25,000	25,000
Bluffton MLK Observance Committee: 9 th Annual Bluffton Juneteenth Festival Weekend	20,000	20,000
Historic Bluffton Foundation: Welcome Center at the Heyward House (FY25 Q1)	40,000	40,000
Historic Bluffton Foundation: Luke Peeples Music Celebration	5,000	Tabled
Total for the Quarter	\$ 153,632	\$ 148,632

BACKGROUND:

In accordance with the grant process, the Accommodations Tax Advisory Committee (ATAC) held a meeting on May 21, 2024 to review the quarterly applications. There were six (6) applications to review and make recommendations of funding to Town Council.

Additionally, ATAC reviewed the recommended Town Ordinance changes to Chapter 24 – Taxation and has no additional comments.

Lastly, ATAC is looking to hold a Workshop to review the application process and requirements. The date tentatively scheduled for the Workshop is Tuesday, July 30, 2024.

Funds Currently Available for Distribution:

When comparing the estimated State and Local Accommodations Tax collections for the quarter ending March 2024 to the same quarter of last year, the revenues are up \$15,325 or approximately 10.6%.

Total estimated State Accommodations Tax funds currently available for distribution are \$398,461 as outlined in the following chart:

State ATAX	
Remaining from Previous Quarter	\$ 189,431
3 rd Quarter Revenue	159,427
First \$25k to General Fund*	N/A
5% to General Fund	(7,971)
30% to DMO	(47,828)
Lapsed Grants	105,402
Total State ATAX Funds Remaining for Distribution	\$ 398,461

* First \$25k taken in 1st Quarter of Fiscal Year and Not Applicable (N/A) to the remaining quarters.

Funds Requested for Distribution:

❑ **Society of Bluffton Artists (SoBA) requested \$20,000 in support of advertising and promotion of tourism for its 30th Year Anniversary Project.**

- The gallery/education center is located at 6 Church Street in Old Town Bluffton.
- To grow media presence and expand advertising, host events, and a Gala to celebrate SOBA's contributions to the community.
- Eligible "tourism-related expenditures" include:
 - "Advertising and promotion of tourism" is budgeted at \$40,000 for social media, advertising blitz for festive events, Gala, and news articles and interviews throughout South Carolina and adjoining state media.

The committee voted to recommend a total award of \$20,000 presented in the chart below:

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Total Budget for Category		Recommended ATAX Funds
Advertising & Promotion of Tourism or Arts and Cultural Events	\$ 40,000		\$ 20,000
Facilities for Civic and Cultural Events	-		
Public Facilities	-		
Municipality and County Services	-	*	
Tourist Transportation	-	*	
Other/Ineligible Project Expenses	210,846.85		
Total	\$ 250,846.85		\$ 20,000

❑ **Hilton Head Symphony Orchestra requested \$43,632 to support advertising and promotion of tourism and facilities for civic and cultural events for the 2024 Bluffton Concerts.**

- There are two events scheduled; the Outdoor Pops concert on October 17, 2024 to coincide with the Historic Arts & Seafood Festival and a Holiday Pops concert held on November 30, 2024 at St. Gregory the Great Catholic Church.
- The project is a continuation of the long-range goal of regular, annual concerts presented in Bluffton.
- Eligible “tourism-related expenditures” include:
 - “Advertising and promotion of tourism” is budgeted at \$16,423.
 - “Facilities for cultural events” is budgeted at \$26,950 for stage and tent rentals.
 - “Public Facilities” is budgeted at \$259 for Port-o-Lets rental.

The committee voted to recommend a total award of \$46,632 presented in the chart below:

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Total Budget for Category		Recommended ATAX Funds
Advertising & Promotion of Tourism or Arts and Cultural Events	\$ 16,423		\$ 16,423
Facilities for Civic and Cultural Events	26,950		26,950
Public Facilities	259		259
Municipality and County Services	-	*	-
Tourist Transportation	-	*	-
Other/Ineligible Project Expenses	46,077		
Total	\$ 89,709		\$ 43,632

❑ **BlacQuity is requesting \$25,000 to support the Roots & River Festival project.**

- This event to be held on September 14, 2024 at Oyster Factory Park from 2-8 pm.
- ATAC recommends \$25,000 to support the 2024 event.
- Eligible “tourism-related expenditures” include:
 - “Advertising and promotion of tourism” is budgeted at \$42,500.
 - “Facilities for cultural events” is budgeted at \$3,000 for stage and tent rentals.
 - “Public Facilities” is budgeted at \$1,800 for Port-o-Lets rental.

The committee voted to recommend a total award of \$25,000.

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Total Budget for Category		Recommended ATAX Funds
Advertising & Promotion of Tourism or Arts and Cultural Events	\$ 42,500		\$ 25,000
Facilities for Civic and Cultural Events	3,000		
Public Facilities	1,800	*	
Municipality and County Services	850	*	
Tourist Transportation	1,200	*	
Other/Ineligible Project Expenses	17,800		
Total	\$ 67,150		\$ 25,000

❑ **Bluffton MLK Observation Committee requests \$20,000 to support advertising and promotion of tourism, facilities for civic and cultural events, municipality services, and tourist transportation for 9th Annual Bluffton Juneteenth Weekend.**

- This event is scheduled to be held June 14 - 16, 2024 at the Burnt Church Distillery.
- The project is aimed at bringing overnight guests to the event with it being held over a weekend.
- Eligible “tourism-related expenditures” include:
 - “Advertising and promotion of tourism” is budget at \$15,500
 - “Facilities for cultural events” is budgeted at \$18,000 for stage and tent rentals.
 - “Public facilities” \$2,500 for sanitation and is based upon % of tourist attendance.
 - “Municipality services” \$5,000 for security based upon % of tourist attendance.
 - “Tourist transportation” \$3,000 based upon % of tourist attendance.

The committee voted to recommend a total award of \$20,000 presented in the chart below:

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Total Budget for Category		Recommended ATAX Funds
Advertising & Promotion of Tourism or Arts and Cultural Events	\$ 15,500		\$ 15,500
Facilities for Civic and Cultural Events	18,000		2,190
Public Facilities	2,500	*	1,050
Municipality and County Services	5,000	*	
Tourist Transportation	3,000	*	1,260
Other/Ineligible Project Expenses	14,500		
Total	\$ 58,500		\$ 20,000

❑ **Historic Bluffton Foundation (HBF) requests \$40,000 to support the Welcome Center at the Heyward House for the first quarter of the fiscal year for July 1, 2024 through September 30, 2024.**

- The Heyward House serves as the Town of Bluffton’s official Welcome (Visitors) Center.
- The request of \$40,000 is approximately 46.7% of the Welcome Center’s quarterly.
- This year’s request is for the first quarter as recommended by the Town with the Town of Bluffton Welcome Center anticipated to open in January 2025.
- Total visitors for FY2023 was over 18,550 with approximately 87% of those being from out of town.
- Eligible “tourism-related expenditures” include:
 - “Advertising and promotion of tourism” is budgeted at \$7,800 for the year.
 - “Facilities for civic and cultural vents” is budgeted at \$124,300 for the year.
 - “Operating Visitor Information Center” is budgeted at \$207,200 and qualifies per SC Revenue Ruling #98-22, *“expenditures that will qualify under this category are any monies spent to operate and maintain centers whose primary purpose is to provide information, brochures, and other services to tourist.”*

The committee voted to recommend a total award of \$40,000 presented in the chart below:

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

☐ **Historic Bluffton Foundation (HBF) requests \$5,000 to support the Luke Peeples Music Celebration.**

- This is the first event HBF is hosting and requesting funding to support.
- Due to the lack of information and eligible expenses, ATAC recommends the applicant submit for the next quarter with a revised and more complete application.

The committee voted to table the request:

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Total Budget for Category		Recommended ATAX Funds
Advertising & Promotion of Tourism or Arts and Cultural Events	\$2,000		
Facilities for Civic and Cultural Events	1,200		
Public Facilities			
Municipality and County Services		*	
Tourist Transportation		*	
Visitors Centers			
Other/Ineligible Project Expenses	10,000		
Total	\$13,200		Tabled

NEXT STEPS:

Town Staff will notify organizations of award amount and requirements.

SUMMARY:

Below are the applications received for quarter ending March 31, 2024 and ATAC's recommendation for each:

Requesting Organization	Amount Requested	Amount Recommended
Society of Bluffton Artists: 30 th Year Anniversary	\$ 20,000	\$ 20,000
Hilton Head Symphony Orchestra: 2024 Bluffton Concerts	43,632	43,632
BlacQuity SC: 2024 Roots & Rivers Festival	25,000	25,000
Bluffton MLK Observance Committee: 9 th Annual Bluffton Juneteenth Festival Weekend	20,000	20,000
Historic Bluffton Foundation: Welcome Center at the Heyward House (FY25 Q1)	40,000	40,000
Historic Bluffton Foundation: Luke Peeples Music Celebration	5,000	Tabled
Total for the Quarter	\$ 153,632	\$ 148,632

ATTACHMENTS:

1. ATAC draft meeting minutes from May 21, 2024
2. Society of Bluffton Artists: 30th Year Anniversary Grant Application
3. Society of Bluffton Artists: 30th Year Anniversary ATAC Staff Report
4. Hilton Head Symphony Orchestra: 2024 Bluffton Concerts Grant Application
5. Hilton Head Symphony Orchestra: 2024 Bluffton Concerts ATAC Staff Report
6. BlacQuity SC: Roots & Rivers Festival Grant Application
7. BlacQuity SC: Roots & Rivers Festival ATAC Staff Report
8. Bluffton MLK Observance Committee: 9th Annual Bluffton Juneteenth Festival Weekend Grant Application
9. Bluffton MLK Observance Committee: 9th Annual Bluffton Juneteenth Festival Weekend ATAC Staff Report
10. Historic Bluffton Foundation: Welcome Center at the Heyward House Grant Application
11. Historic Bluffton Foundation: Welcome Center at the Heyward House ATAC Staff Report
12. Historic Bluffton Foundation: Luke Peeples Music Celebration Grant Application
13. Historic Bluffton Foundation: Luke Peeples Music Celebration ATAC Staff Report
14. ATAC Scoring Table Rating Matrix
15. Previously Funded Grant Listing
16. Recommended Motions

Accommodation Tax Advisory Committee Meeting

Theodore D. Washington Municipal Building, Henry “Emmett” McCracken Jr. Council Chambers,
20 Bridge Street, Bluffton, SC

May 21, 2024

I. CALL TO ORDER

Vice-Chair S. Britt called the meeting to order at 6:30 p.m.

II. ROLL CALL

PRESENT

Vice Chair Sam Britt
Allyne Mitchell
Nate Pringle
Ellen Shumaker
Scott Thrasher

ABSENT

Chairperson Christy Parker

III. ADOPTION OF MINUTES

1. Meeting Minutes of February 26, 2024

Motion approving minutes made by Mitchell, Seconded by Thrasher.

Voting Yea: Vice Chair Britt, Mitchell, Pringle, Shumaker, Thrasher

IV. PUBLIC COMMENT

V. FINANCIAL REPORT

Natalie Majorkiewicz, Director of Finance, reported that there is \$398,461 available in State ATAX for distribution based on funds remaining from previous quarters, lapsed grants and second quarter collections. The current quarter application requests total \$153,632.

VI. OLD BUSINESS

VII. NEW BUSINESS

1. Committee Approval and Recommendation to Town Council of the Hilton Head Island-Bluffton Chamber of Commerce's Bluffton Marketing Plan FY2024-2025 Budget as the Town's Designated Marketing Organization (DMO)

Motion approving and recommending to Town Council the DMO Marketing Plan as presented made by Mitchell, Seconded by Shumaker.

Voting Yea: Vice Chair Britt, Mitchell, Pringle, Shumaker, Thrasher

2. Grant Applicants' Presentations and Q&A

1. Society of Bluffton Artists: 30th Anniversary - \$20,000

Motion to recommend an award of \$20,000 to Town Council made by Vice Chair Britt,
Seconded by Mitchell.

Voting Yea: Vice Chair Britt, Mitchell, Pringle, Shumaker, Thrasher

2. Hilton Head Symphony Orchestra: 2024 Bluffton Concerts - \$43,632

Motion to recommend an award of \$43,632 to Town Council made by Mitchell, Seconded
by Shumaker.

Voting Yea: Vice Chair Britt, Mitchell, Pringle, Shumaker, Thrasher

3. BlacQuity: 2024 River and Roots Festival - \$25,000

Motion to recommend an award of \$25,000 to Town Council made by Shumaker,
Seconded by Thrasher.

Voting Yea: Vice Chair Britt, Mitchell, Pringle, Shumaker, Thrasher

4. MLK Observance Committee: 9th Annual Bluffton Juneteenth Festival Weekend - \$20,000

Motion to recommend an award of \$20,000 to Town Council made by Thrasher, Seconded
by Shumaker.

Voting Yea: Vice Chair Britt, Mitchell, Pringle, Shumaker, Thrasher

5. Historic Bluffton Foundation: Heyward House Welcome Center Q1 Allocation - \$40,000

Motion to recommend an award of \$40,000 to Town Council made by Mitchell, Seconded
by Vice Chair Britt.

Voting Yea: Vice Chair Britt, Mitchell, Pringle, Shumaker, Thrasher

6. Historic Bluffton Foundation: Luke Peeple's Music Celebration - \$5,000

Motion to table this request until next quarter made by Mitchell, Seconded by Pringle.

Voting Yea: Vice Chair Britt, Mitchell, Pringle, Shumaker, Thrasher

3. Review of Changes to Town of Bluffton Code of Ordinances, Chapter 24, Taxation

N. Majorkiewicz reviewed proposed changes to the ordinance, which passed First Reading of
Town Council on Tuesday, May 14 and will go before Town Council for a Second and Final
Reading on Tuesday, June 11, 2024. No action taken.

4. Workshop Agenda and Date

A workshop to discuss potential updates to ATAX grant policies and procedures will be held on Tuesday, July 30 at 5:30 p.m. in Town Council Chambers.

VIII. DISCUSSION

IX. ADJOURNMENT

Motion to adjourn made by Vice Chair Britt, Seconded by Shumaker.

Voting Yea: Vice Chair Britt, Mitchell, Pringle, Shumaker, Thrasher

Meeting adjourned at 7:57 p.m.

Milroy, Shannon

From: noreply@civicplus.com
Sent: Sunday, March 24, 2024 3:30 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	3/25/2024
Full Legal Organization Name	Society of Bluffton Artists
Project Name	30th year Anniversary
Total Project Costs	40,000
Total ATAX Funds Requested	20,000
Percent of Total Budget	50%
Address	6 Church Street

Street Address Line 2	PO Box 1972
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.

[state charity regis..pdf](#)

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

[Report Permit53159_638464765308655611.pdf](#)

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Organization Primary Point of Contact

First Name	Mary Ann
Last Name	Burgeson
Title	President
Phone Number	843 816 3776
E-mail Address	sobaupdates@sobagallery.com

(Section Break)

Organization Secondary Point of Contact

First Name	John
Last Name	Kenney
Title	Treasurer
Phone Number	434 960 3622

E-mail Address sobaupdates@sobagallery.com

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Project Description: This is our 30th year of operating in Old Town Bluffton. We are celebrating by having advertising blitz, social media to our thousands of followers, festive events on our lawn and porch to attract tourists and visitors, a Gala to celebrate all of SOBA's contributions to the community with news articles and interviews and pictures in all of South Carolina as well as adjoining states media contacts.

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: Our impact on tourism has been on going since Bluffton was designated a Art Cultural Center for the state. We spread the word and the feeling that Bluffton is a warm and welcoming destination with a multitude of attractions to entertain guests. We sponsor or participate in all local events such a the festivals and art walks and everything that Old Town Bluffton Merchants schedules. Over 70% of our guests that visit the gallery are from out of the area.

“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: 1/1/2024 - 12/31/2024

Multi-Year Project/Event? No

Permits Required, if any: none

Additional Comments: Our goal is to stay in Bluffton for another 30 years and to that aim we will be looking into purchasing a permanent home here in Old Town. In order to do that we will need the support of the Town of Bluffton and other sponsors. Therefore we need to impress every one with our value in bringing in visitors and clients. And with the services we offer like classes which attract not only residents but summer visitors as well. We support all things Bluffton from our beautiful art of our surroundings, to loaning art to enhance other business as well. This is all to make our home look great and make people want to return and we are confident that we do!

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

FINANCIAL INFORMATION

Project/Event Line Item [SOBA 23-24 Budget revision3-23-24.ods](#)
Budget

Most Recent Fiscal Year [SOBA - FEBRUARY 2024 BANK REC, AND PROFIT AND](#)
Balance Sheet and [LOSS.pdf](#)
Profit and Loss
Accounting Statement

Financial Guarantee [SOBA Minutes March 2024.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	from our working budget
--------------	-------------------------

Amount/Value	20,000
--------------	--------

Contribution	volunteer hours
--------------	-----------------

Amount/Value 10,000

(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?

No

If yes, please list all sources and amounts:

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

PRIOR RECIPIENT'S REPORT

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

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

Has your organization previously received ATAX funds from the Town of Bluffton?

Yes

Project/Event Name Expanding our Marketing reach

Year 2023

Amount Awarded 15,000

Was project completed? Yes

How were the funds used? To advertise our events, classes, visitor opportunities, in ads, articles, pictures and social media

What impact did this project/event have on the community or benefit tourism? We have a guest book that we request guests to sign. It has recorded a steady increase in tourist visitors.

Describe how the tourism data was measured.

(Section Break)

Please provide the project/event budgets for the previous two (2) years. *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	Mary Ann Burgeson
Signatory's Title or Position	President

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

CINCINNATI OH 45999-0038

In reply refer to: 0248367576
Sep. 05, 2014 LTR 4168C 0
74-3012888 000000 00

00022034
BODC: TE

 SOCIETY OF BLUFFTON ARTISTS INC
X DAVID POST TREASURER
PO BOX 1972
BLUFFTON SC 29910

.8964

Employer Identification Number: 74-3012888
Person to Contact: Ms. Yates
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Aug. 26, 2014, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in February 2002.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Requests, 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.

Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

C-6

25



State of South Carolina
Office of the Secretary of State
The Honorable Mark Hammond

Attac Section IX. Item #3.

1/9/2023

Society of Bluffton Artists
Marie Burgeson
PO BOX 1972
BLUFFTON, SC29910-1972

RE: Registration Confirmation

Charity Public ID: P10294

Dear Marie Burgeson :

This letter confirms that the Secretary of State's Office has received and accepted your Registration, therefore, your charitable organization is in compliance with the registration requirement of the "South Carolina Solicitation of Charitable Funds Act." The registration of your charitable organization will expire on 1/15/2024.

If any of the information on your Registration form changes throughout the course of the year, please contact our office to make updates. It is important that this information remain updated so that our office can keep you informed of any changes that may affect your charitable organization.

If you have not yet filed your annual financial report or an extension for the annual financial report, the annual financial report is still due 4½ months after the close of your fiscal year.

- Annual financial reports must either be submitted on the Internal Revenue Service Form 990 or 990-EZ or the Secretary of State's Annual Financial Report Form.
- If you wish to extend the filing of that form with us, please submit a written request by email or fax to our office using the contact information below. Failure to submit the annual financial report may result in an administrative fine of up to \$2,000.00.

If you have any questions or concerns, please visit our website at www.sos.sc.gov or contact our office using the contact information below.

Sincerely,

Kimberly S. Wickersham
Director, Division of Public Charities

TOWN OF BLUFFTON

TOWN OF BLUFFTON - Expires:04/30/2025

License No.	24-03-0508	Business Name:	Society of Bluffton Artists
	03/19/2024		
NAICS Title:	Fine Arts Schools	Business DBA Name:	SOBA
Business Type:		Physical Address:	
ART STUDIO/CLASSES		8 CHURCH 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.

John Kenney
John Kenney
8 Church St
Bluffton, SC 29910

SOBA	budget fy 23	Actual	2023-24 budget
Income			
Art Sales	150000	134484.81	140000
Bluffton A-Tax	13000	8388.14	8000
art school	42000	47612	48000
Holiday Boutique	2500	5655.2	6000
Hughes Art Fund			
Interest income	50	132.65	3200
Judge Show	5600	4825	5000
Membership Dues	25000	29050	29000
fund raiser		398	5000
Other Income Scholarship Fund			
Total Income	238150	230544	244200
Cost of Goods Sold			
Art Class Expense	1300	2322.9	2400
Art Teacher expense	30000	31784.45	32000
Total Art Class Expense	31300	34167.35	34400
Artist Commissions	97500	100861.16	91000
Total Cost of Goods Sold	128800	135028	125400
Gross Profit	109359	95516	118800
Expenses			
Accounting & Professional Fees	7000	7981.25	8000
Advertising & Marketing	15000	16476	40000
CC, Disc, & Paypal Charges	900	501	600
Dues & subscriptions	350	166	500
Insurance	350	1288	1550
Judge Show expenses	510		0
Judge show - advertising			
Total Judge Show expenses	5600	4734	5000
Landscaping Expense	2800	2640	2700
Miscellaneous Expenses			
Postage	400	285	300
fund raiser			3000
Printing & Signage	1600	169	200
Repair & Maintenance	2500	5387	2000
Scholarships Paid			
Show Expenses			0
Square Fees	5500	6290	6500
Supplies, Office & Operating	2500	5235	5000
Taxes & Licenses	51.85	51.85	51.85
-internet telephone	1500	944	1000
rent	47275	43186	45345
Utilities - Electric	3500	3095	3200
Utilities - Internet			
Utilities - Water	500	475	500
Total Expenses	97836.85	98904.1	125446.85...
Net Operating Income			
Other Income			0
Net Other Income	0		
Net Income	11523	-3388	-6646.85

Soba

Profit and Loss

February 2024

	TOTAL	
	FEB 2024	SEP 2023 - FEB 2024 (YTD)
Income		
Art Sales	12,549.00	79,314.02
Art Sales - Student	885.00	885.00
Art School Income	4,865.00	33,778.00
Art School Rent Income	150.00	475.00
Bluffton A-Tax	3,088.74	14,318.93
Donations		16,510.00
Holiday Boutique		6,865.00
Interest income	2.08	537.03
Judge Show	1,875.00	6,875.00
Membership Dues	675.00	7,425.00
Other Income	13.00	148.84
Total Income	\$24,102.82	\$167,131.82
Cost of Goods Sold		
Art Class Expense	137.00	572.35
Art Teacher expense	5,751.85	18,012.87
Total Art Class Expense	5,888.85	18,585.22
Artist Commissions	8,052.30	56,044.43
Artist Commissions - Student	885.00	885.00
Total Cost of Goods Sold	\$14,826.15	\$75,514.65
GROSS PROFIT	\$9,276.67	\$91,617.17
Expenses		
Accounting & Professional Fees	636.95	4,832.02
Advertising & Marketing	1,994.56	13,372.23
CC, Disc, & Paypal Charges	38.83	163.06
Insurance		674.00
Interest		3.24
Judge Show expenses	10.20	71.06
Judge show - advertising		550.00
Total Judge Show expenses	10.20	621.06
Landscaping Expense	200.00	1,200.00
Postage		264.00
Printing & Signage		112.13
Rent	3,780.00	21,306.00
Repair & Maintenance	1,274.00	1,902.77
Square Fees	562.04	3,739.21
Supplies, Office & Operating	1,326.19	4,070.08
Taxes & Licenses		51.85
Telephone / Internet	137.97	413.91
Utilities - Electric	286.32	1,626.90

	TOTAL	
	FEB 2024	SEP 2023 - FEB 2024 (YTD)
Utilities - Water	41.46	306.48
Total Expenses	\$10,288.52	\$54,658.94
NET OPERATING INCOME	\$ -1,011.85	\$36,958.23
NET INCOME	\$ -1,011.85	\$36,958.23

Operating Account, Period Ending 02/29/2024

RECONCILIATION REPORT

Reconciled on: 03/11/2024

Reconciled by: Carolyn Raffo

Any changes made to transactions after this date aren't included in this report.

Summary

USD

Statement beginning balance.....	53,747.91
Interest earned.....	2.08
Checks and payments cleared (60).....	-18,343.00
Deposits and other credits cleared (28).....	25,618.49
Statement ending balance.....	61,025.48
Uncleared transactions as of 02/29/2024.....	-20,377.18
Register balance as of 02/29/2024.....	40,648.30
Cleared transactions after 02/29/2024.....	0.00
Uncleared transactions after 02/29/2024.....	-6,045.43
Register balance as of 03/11/2024.....	34,602.87

Details

Checks and payments cleared (60)

DATE	TYPE	REF NO.	PAYEE	AMOUNT (USD)
11/30/2023	Bill Payment	10273	Nancy Huson	-23.40
12/30/2023	Bill Payment	10318	Jennilea O'Connor	-19.50
12/30/2023	Bill Payment	10321	Karen Richards	-44.20
12/30/2023	Bill Payment	10337	Sandra Campeau	-19.50
12/30/2023	Bill Payment	10341	Terry Brennan	-227.50
12/30/2023	Bill Payment	10343	Theofano Sevastos	-9.75
12/31/2023	Bill Payment	10294	Bonnie Wade Mucia	-143.00
12/31/2023	Bill Payment	10317	Jeanne Francisco	-9.75
01/31/2024	Bill Payment	10377	Lynne Drake	-354.25
01/31/2024	Bill Payment	10378	Marie Camenares	-29.25
01/31/2024	Bill Payment	10379	Mary Gentile	-2,050.75
01/31/2024	Bill Payment	10380	Mary Treadwell	-211.25
01/31/2024	Bill Payment	10381	Maxine Uttal	-19.50
01/31/2024	Bill Payment	10382	Omega	-80.25
01/31/2024	Bill Payment	10383	Pamela Davis	-243.75
01/31/2024	Bill Payment	10384	Robert White	-149.50
01/31/2024	Bill Payment	10385	Ruth McCully	-91.00
01/31/2024	Bill Payment	10386	Sandra Campeau	-383.50
01/31/2024	Bill Payment	10387	Sheryl Winn	-42.25
01/31/2024	Bill Payment	10388	SL Schuena Inc.	-12.96
01/31/2024	Bill Payment	10389	Steven Higgins	-61.75
01/31/2024	Bill Payment	10390	Tarcisio Ciancio	-9.75
01/31/2024	Bill Payment	10391	Terrie White	-265.55
01/31/2024	Bill Payment	10392	The Bluffton Sun/Hilton Head ...	-201.00
01/31/2024	Bill Payment	10394	Virginia Cassidy	-146.25
01/31/2024	Bill Payment	10395	Amando Santos	-200.00
01/31/2024	Bill Payment	10396	Maria del Rosario Alvarado	-80.00
01/31/2024	Bill Payment	10397	Danielle Connolly	-26.00
01/31/2024	Bill Payment	10376	Lisa Dunaj	-802.10
01/31/2024	Bill Payment	10375	Lettie Husson	-32.50
01/31/2024	Bill Payment	10374	Karen Serafini	-581.75
01/31/2024	Bill Payment	10373	Karen Russell	-29.25
01/31/2024	Bill Payment	10372	Karen Magill	-198.25
01/31/2024	Bill Payment	10371	Julia Kamenskikh	-178.75
01/31/2024	Bill Payment	10368	HHL-Bluffton Chamber of Com...	-950.00
01/31/2024	Bill Payment	10369	Janet Urbanic	-62.40
01/31/2024	Bill Payment	10370	Joan McKeever	-31.20
01/31/2024	Bill Payment	10367	Heather Wannamaker	-227.50
01/31/2024	Bill Payment	10366	Glenn & Glenn, LLC	

DATE	TYPE	REF NO.	PAYEE	Attac	Section IX. Item #3.
01/31/2024	Bill Payment	10365	Frank Bright		
01/31/2024	Bill Payment	10363	Doris Jones Vargas		-222.30
01/31/2024	Bill Payment	10362	Donna Raines		-130.00
01/31/2024	Bill Payment	10361	Dianne Mertins		-55.25
01/31/2024	Bill Payment	10360	Christy Chen		-55.25
01/31/2024	Bill Payment	10352	Anita Stephens		-289.25
01/31/2024	Bill Payment	10353	Barbara Pecce		-227.50
01/31/2024	Bill Payment	10354	Brenda Fallon		-29.25
01/31/2024	Bill Payment	10355	Burrell		-132.30
01/31/2024	Bill Payment	10356	Carol Dombrowski		-16.25
01/31/2024	Bill Payment	10357	Carolyn Raffo		-530.00
01/31/2024	Bill Payment	10358	Catherine Thiem		-152.75
01/31/2024	Bill Payment	10359	Christine Crotty		-77.35
02/02/2024	Bill Payment	1	Equity Payment Inc		-38.83
02/03/2024	Bill Payment	1	Beafort-Jasper Water & Sewe...		-41.46
02/03/2024	Bill Payment	2	Momentun Media Group Inc		-684.00
02/14/2024	Bill Payment	10398	The Bluffton Sun/Hilton Head ...		-138.00
02/15/2024	Bill Payment	2	VISA		-1,000.00
02/20/2024	Sales Tax Payment				-637.16
02/21/2024	Bill Payment	10030	Janet C Stevens, LLC		-312.04
02/21/2024	Bill Payment	10400	Keys and Son, LLC		-1,274.00
Total					-18,343.00

Deposits and other credits cleared (28)

DATE	TYPE	REF NO.	PAYEE	AMOUNT (USD)
01/31/2024	Deposit		Sales Customer	2,005.36
01/31/2024	Sales Receipt	3348	Sales Customer	423.61
02/01/2024	Sales Receipt	3357	Sales Customer	553.52
02/02/2024	Sales Receipt	3358	Sales Customer	493.06
02/04/2024	Sales Receipt	3359		925.52
02/05/2024	Sales Receipt	3361	Sales Customer	326.94
02/06/2024	Sales Receipt	3362	Sales Customer	359.40
02/07/2024	Sales Receipt	3364	Sales Customer	329.23
02/08/2024	Sales Receipt	3365	Sales Customer	1,484.67
02/09/2024	Sales Receipt	3367	Sales Customer	3,887.75
02/10/2024	Sales Receipt	3370	Sales Customer	1,893.64
02/12/2024	Sales Receipt	3372	Sales Customer	401.68
02/13/2024	Sales Receipt	3374	Sales Customer	619.57
02/14/2024	Deposit		Sales Customer	375.00
02/14/2024	Sales Receipt	3380	Sales Customer	438.89
02/15/2024	Sales Receipt	3381	Sales Customer	227.30
02/16/2024	Sales Receipt	3384	Sales Customer	1,359.71
02/18/2024	Sales Receipt	3385	Sales Customer	1,335.82
02/19/2024	Sales Receipt	3387	Sales Customer	164.74
02/20/2024	Sales Receipt	3388	Sales Customer	680.67
02/21/2024	Sales Receipt	3389	Sales Customer	353.76
02/22/2024	Sales Receipt	3391	Sales Customer	178.52
02/23/2024	Sales Receipt	3392	Sales Customer	224.76
02/24/2024	Sales Receipt	3394	Sales Customer	535.51
02/26/2024	Sales Receipt	3396	Sales Customer	154.99
02/27/2024	Sales Receipt	3397	Sales Customer	535.67
02/28/2024	Sales Receipt	3399	Sales Customer	293.47
02/29/2024	Deposit		Sales Customer	5,055.73
Total				25,618.49

Additional Information

Uncleared checks and payments as of 02/29/2024

DATE	TYPE	REF NO.	PAYEE	Attac	Section IX. Item #3.
06/30/2023	Bill Payment	9998	David Vance		
10/31/2023	Bill Payment	10220	Ann Hyde		-97.37
12/14/2023	Bill Payment	1	Beafort-Jasper Water & Sewe...		-47.27
12/31/2023	Bill Payment	10309	Floyd Rees		-178.75
01/31/2024	Bill Payment	10364	Fish Cat Design, LLC		-30.55
01/31/2024	Bill Payment	10393	Theresa King		-35.10
02/29/2024	Bill Payment	10487	Ruth McCully		-146.25
02/29/2024	Bill Payment	10488	Sandy Rhodes		-373.75
02/29/2024	Bill Payment	10489	SL Schuena Inc.		-56.95
02/29/2024	Bill Payment	10490	Sue Mentis		-130.00
02/29/2024	Bill Payment	10491	Tarcisio Ciancio		-58.50
02/29/2024	Bill Payment	10492	Terrie White		-444.50
02/29/2024	Bill Payment	10493	Theofano Sevastos		-9.75
02/29/2024	Bill Payment	10494	Theresa King		-11.70
02/29/2024	Bill Payment	10495	Virginia Cassidy		-211.25
02/29/2024	Bill Payment	10496	Sandy Rhodes		-10.20
02/29/2024	Bill Payment	10416	Amando Santos		-200.00
02/29/2024	Bill Payment	10417	David Rankin		-4,072.25
02/29/2024	Bill Payment	1	Bragg		-950.00
02/29/2024	Bill Payment	2	Dominion Energy		-286.32
02/29/2024	Bill Payment	10431	Anita Stephens		-19.50
02/29/2024	Bill Payment	10432	Anthony Collichio		-455.00
02/29/2024	Bill Payment	10433	Barbara Pecce		-57.00
02/29/2024	Bill Payment	10434	Bonnie Wade Mucia		-35.75
02/29/2024	Bill Payment	10435	Burrell		-1,168.80
02/29/2024	Bill Payment	10436	Carol Dombrowski		-36.04
02/29/2024	Bill Payment	10437	Carol Dulude		-130.00
02/29/2024	Bill Payment	10438	Carol Iglesias		-377.00
02/29/2024	Bill Payment	10439	Carolyn Raffo		-580.00
02/29/2024	Bill Payment	10440	Catherine Thiem		-312.00
02/29/2024	Bill Payment	10441	Christine Crotty		-13.00
02/29/2024	Bill Payment	10442	Christy Chen		-81.25
02/29/2024	Bill Payment	10443	Dianne Mertins		-110.50
02/29/2024	Bill Payment	10444	Donna Raines		-149.50
02/29/2024	Bill Payment	10445	Doris Jones Vargas		-149.50
02/29/2024	Bill Payment	10446	Fish Cat Design, LLC		-33.15
02/29/2024	Bill Payment	10447	Frank Bright		-26.00
02/29/2024	Bill Payment	10448	George (Pete) W. Schramm		-61.75
02/29/2024	Bill Payment	10449	Gerardo Rodriguez		-110.00
02/29/2024	Bill Payment	10450	Glenn & Glenn, LLC		-3,970.00
02/29/2024	Bill Payment	10451	Haldora bjornsson		-35.10
02/29/2024	Bill Payment	10452	Hannah Fulton		-90.00
02/29/2024	Bill Payment	10453	Harley Rose Galvin		-50.00
02/29/2024	Bill Payment	10454	Heather Matuzak		-80.00
02/29/2024	Bill Payment	1	Isabella Robertello		-85.00
02/29/2024	Bill Payment	10455	Jaclyn Odom		-50.00
02/29/2024	Bill Payment	10456	Jacqueline Schletter		-48.75
02/29/2024	Bill Payment	10457	Janet Urbanic		-248.95
02/29/2024	Bill Payment	10458	Jeanne Francisco		-29.25
02/29/2024	Bill Payment	10459	Jennilea O'Connor		-61.75
02/29/2024	Bill Payment	10460	Joan McKeever		-86.45
02/29/2024	Bill Payment	10461	John Meckley		-650.00
02/29/2024	Bill Payment	10462	Jojo Dima		-45.00
02/29/2024	Bill Payment	10463	Julia Kamenskikh		-308.75
02/29/2024	Bill Payment	10464	Karen Alt		-146.25
02/29/2024	Bill Payment	10465	Karen Magill		-286.00
02/29/2024	Bill Payment	10466	Karen Russell		-26.00
02/29/2024	Bill Payment	10467	Kate Goldstein		-65.00
02/29/2024	Bill Payment	10468	Leah Nadolski		-45.00
02/29/2024	Bill Payment	10469	Leslie Gayle		-9.75
02/29/2024	Bill Payment	10470	Lettie Husson		-26.00
02/29/2024	Bill Payment	10471	Lisa Dunaj		-2,148.90
02/29/2024	Bill Payment	10472	Locke		
02/29/2024	Bill Payment	10473	Lucia Carbone		

DATE	TYPE	REF NO.	PAYEE	AMOUNT (USD)
02/29/2024	Bill Payment	10474	Lynne Drake	
02/29/2024	Bill Payment	10475	Madeline Holmes	-65.00
02/29/2024	Bill Payment	10476	Margaret W Smith	-19.50
02/29/2024	Bill Payment	10477	Marie Camenares	-162.50
02/29/2024	Bill Payment	10478	Mary Ann Burgeson	-56.69
02/29/2024	Bill Payment	10479	Mary Treadwell	-11.70
02/29/2024	Bill Payment	10480	Meghan Mayer	-40.00
02/29/2024	Bill Payment	10481	Mia Caren	-45.00
02/29/2024	Bill Payment	10482	Michele Maffei	-260.00
02/29/2024	Bill Payment	10483	Nicholas Dimona	-32.50
02/29/2024	Bill Payment	10484	Patricia Vollmer	-169.00
02/29/2024	Bill Payment	10485	Riley Giglio	-65.00
02/29/2024	Bill Payment	10486	Robert White	-217.10

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Total -21,653.74

Uncleared deposits and other credits as of 02/29/2024

DATE	TYPE	REF NO.	PAYEE	AMOUNT (USD)
02/29/2024	Sales Receipt	3400	Sales Customer	660.92
02/29/2024	Deposit		Sales Customer	615.64

Total 1,276.56

Uncleared checks and payments after 02/29/2024

DATE	TYPE	REF NO.	PAYEE	AMOUNT (USD)
03/04/2024	Bill Payment	1	Beafort-Jasper Water & Sewe...	-42.62
03/05/2024	Bill Payment	10497	Greg Barnes	-500.00
03/05/2024	Bill Payment	10513	Susan Grilli	-100.00
03/05/2024	Bill Payment	10506	Steven Higgins	-200.00
03/05/2024	Bill Payment	10501	Philip Palmer	-300.00
03/05/2024	Bill Payment	10514	Marianne Stillwagon	-100.00
03/05/2024	Bill Payment	10510	Anita Stephens	-200.00
03/05/2024	Bill Payment	10507	Barbara Pecce	-200.00
03/05/2024	Bill Payment	10504	Boisvert	-300.00
03/05/2024	Bill Payment	10515	Carol Iglesias	-100.00
03/05/2024	Bill Payment	10508	Connie Rigdon	-200.00
03/05/2024	Bill Payment	10500	Donna Raines	-300.00
03/05/2024	Bill Payment	10509	Heather Constanza	-200.00
03/05/2024	Bill Payment	10505	Jacqueline Schletter	-300.00
03/05/2024	Bill Payment	10498	Jane Capraro	-500.00
03/05/2024	Bill Payment	10499	Karen Serafini	-300.00
03/05/2024	Bill Payment	10511	Kendra Natter	-100.00
03/05/2024	Bill Payment	10512	Lauren Terrett	-100.00
03/05/2024	Bill Payment	10503	Margaret W Smith	-300.00
03/09/2024	Bill Payment	10519	HHL-Bluffton Chamber of Com...	-185.00
03/09/2024	Bill Payment	10517	Omega	-35.31
03/09/2024	Bill Payment	10516	Greg Barnes	-1,482.50

Total -6,045.43

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ACCOUNT:

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Section IX. Item #3.

70015765 02/29/2024

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SOCIETY OF BLUFFTON ARTIST INC
PO BOX 1972
BLUFFTON SC 29910-1972

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INTEREST CHECKING ACCOUNT 70015765

DESCRIPTION	DEBITS	CREDITS	DATE	BALANCE
BALANCE LAST STATEMENT			01/31/24	53,747.91
Square Inc 240201P2 L208854672359		423.61	02/01/24	54,171.52
CHECK # 10343	9.75		02/01/24	54,161.77
INTEREST		2.08	02/01/24	54,163.85
Square Inc 240202P2 L208854888595		553.52	02/02/24	54,717.37
BANKCARD MTOT DISC 510165280102831				
	38.83		02/02/24	54,678.54
CHECK # 10317	9.75		02/02/24	54,668.79
Square Inc 240205P2 L208855197402		493.06	02/05/24	55,161.85
Square Inc 240205P2 L208855197403		925.52	02/05/24	56,087.37
DEPOSIT		2,005.36	02/05/24	58,092.73
CHECK # 10318	19.50		02/05/24	58,073.23
Square Inc 240206P2 L208855413232		326.94	02/06/24	58,400.17
Beaufort-Jasper UTILITY 259352	41.46		02/06/24	58,358.71
MOMENTUM MEDIA G LOCALLIFES M80257356556				
	684.00		02/06/24	57,674.71
CHECK # 10353	227.50		02/06/24	57,447.21
CHECK # 10377	354.25		02/06/24	57,092.96
CHECK # 10379	2,050.75		02/06/24	55,042.21
Square Inc 240207P2 L208855582378		359.40	02/07/24	55,401.61
CHECK # 10355	132.30		02/07/24	55,269.31
CHECK # 10383	243.75		02/07/24	55,025.56
Square Inc 240208P2 L208855781170		329.23	02/08/24	55,354.79
Square Inc 240209P2 L208855957656		1,484.67	02/09/24	56,839.46
CHECK # 10373	29.25		02/09/24	56,810.21
CHECK # 10360	55.25		02/09/24	56,754.96
CHECK # 10389	61.75		02/09/24	56,693.21
CHECK # 10394	146.25		02/09/24	56,546.96
CHECK # 10358	152.75		02/09/24	56,394.21
CHECK # 10380	211.25		02/09/24	56,182.96
CHECK # 10391	265.55		02/09/24	55,917.41

CHECK # 10357	530.00	02/09/24	55,003.41
CHECK # 10374	581.75	02/09/24	
CHECK # 10376	802.10	02/09/24	54,003.56

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Section IX. Item #3.

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ACCOUNT:

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Section IX. Item #3.

70015765 02/29/2024

SOCIETY OF BLUFFTON ARTIST INC

INTEREST CHECKING ACCOUNT 70015765

DESCRIPTION	DEBITS	CREDITS	DATE	BALANCE
CHECK # 10368	950.00		02/09/24	53,053.56
Square Inc 240212P2 L208856247076		1,893.64	02/12/24	54,947.20
Square Inc 240212P2 L208856247075		3,887.75	02/12/24	58,834.95
CHECK # 10390	9.75		02/12/24	58,825.20
CHECK # 10273	23.40		02/12/24	58,801.80
CHECK # 10397	26.00		02/12/24	58,775.80
CHECK # 10321	44.20		02/12/24	58,731.60
CHECK # 10361	55.25		02/12/24	58,676.35
CHECK # 10362	130.00		02/12/24	58,546.35
CHECK # 10384	149.50		02/12/24	58,396.85
CHECK # 10392	201.00		02/12/24	58,195.85
CHECK # 10363	222.30		02/12/24	57,973.55
Square Inc 240213P2 L208856493763		401.68	02/13/24	58,375.23
CHECK # 10354	29.25		02/13/24	58,345.98
CHECK # 10385	91.00		02/13/24	58,254.98
CHECK # 10341	227.50		02/13/24	58,027.48
DEPOSIT		375.00	02/14/24	58,402.48
Square Inc 240214P2 L208856660247		619.57	02/14/24	59,022.05
CHECK # 10388	12.96		02/14/24	59,009.09
CHECK # 10369	62.40		02/14/24	58,946.69
CHECK # 10359	77.35		02/14/24	58,869.34
CHECK # 10371	178.75		02/14/24	58,690.59
CHECK # 10372	198.25		02/14/24	58,492.34
CHECK # 10367	227.50		02/14/24	58,264.84
Square Inc 240215P2 L208856837411		438.89	02/15/24	58,703.73
CHECK	1,000.00		02/15/24	57,703.73
CHECK # 10378	29.25		02/15/24	57,674.48
CHECK # 10396	80.00		02/15/24	57,594.48
CHECK # 10294	143.00		02/15/24	57,451.48
Square Inc 240216P2 L208857082569		227.30	02/16/24	57,678.78
CHECK # 10375	32.50		02/16/24	57,646.28
CHECK # 10382	80.25		02/16/24	57,566.03
Square Inc 240220P2 L208857582139		164.74	02/20/24	57,730.77
Square Inc 240219P2 L208857344049		1,335.82	02/20/24	59,066.59
Square Inc 240219P2 L208857344048		1,359.71	02/20/24	60,426.30
CHECK # 10337	19.50		02/20/24	60,406.80
CHECK # 10370	31.20		02/20/24	60,375.60
CHECK # 10395	200.00		02/20/24	60,175.60
CHECK # 10386	383.50		02/20/24	59,792.10
Square Inc 240221P2 L208857732477		680.67	02/21/24	60,472.77
SC DEPT REVENUE DEBIT 14167068	637.16		02/21/24	59,835.61
CHECK # 10352	289.25		02/21/24	59

CHECK # 10030	312.04	02/21/24	59,234.32
CHECK # 10366	3,970.00	02/21/24	
Square Inc 240222P2 L208857904483	353.76	02/22/24	

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Section IX. Item #3.

70015765 02/29/2024

SOCIETY OF BLUFFTON ARTIST INC

INTEREST CHECKING ACCOUNT 70015765

DESCRIPTION	DEBITS	CREDITS	DATE	BALANCE
CHECK # 10387	42.25		02/22/24	55,575.83
Square Inc 240223P2 L208858144972		178.52	02/23/24	55,754.35
CHECK # 10356	16.25		02/23/24	55,738.10
Square Inc 240226P2 L208858410062		224.76	02/26/24	55,962.86
Square Inc 240226P2 L208858410063		535.51	02/26/24	56,498.37
Square Inc 240227P2 L208858642488		154.99	02/27/24	56,653.36
CHECK # 10381	19.50		02/27/24	56,633.86
Square Inc 240228P2 L208858814314		535.67	02/28/24	57,169.53
CHECK # 10365	81.25		02/28/24	57,088.28
CHECK # 10400	1,274.00		02/28/24	55,814.28
Square Inc 240229P2 L208858987694		293.47	02/29/24	56,107.75
DEPOSIT		5,055.73	02/29/24	61,163.48
CHECK # 10398	138.00		02/29/24	61,025.48
BALANCE THIS STATEMENT			02/29/24	61,025.48

TOTAL DAYS IN STATEMENT PERIOD 02/01/24 THROUGH 02/29/24:

29

TOTAL CREDITS	(29)	25,620.57 ✓
TOTAL DEBITS	(60)	18,343.00

YOUR CHECKS SEQUENCED

DATE...CHECK #.....AMOUNT	DATE...CHECK #.....AMOUNT	DATE...CHECK #.....AMOUNT
02/15 - <i>visa</i> * 1,000.00	02/12 10361 55.25	02/27 10381 19.50
02/21 10030* 312.04	02/12 10362 130.00	02/16 10382 80.25
02/12 10273* 23.40	02/12 10363* 222.30	02/07 10383 243.75
02/15 10294* 143.00	02/28 10365 81.25	02/12 10384 149.50
02/02 10317 9.75	02/21 10366 3,970.00	02/13 10385 91.00
02/05 10318* 19.50	02/14 10367 227.50	02/20 10386 383.50
02/12 10321* 44.20	02/09 10368 950.00	02/22 10387 42.25
02/20 10337* 19.50	02/14 10369 62.40	02/14 10388 12.96
02/13 10341* 227.50	02/20 10370 31.20	02/09 10389 61.75
02/01 10343* 9.75	02/14 10371 178.75	02/12 10390 9.75
02/21 10352 289.25	02/14 10372 198.25	02/09 10391 265.55
02/06 10353 227.50	02/09 10373 29.25	02/12 10392* 201.00
02/13 10354 29.25	02/09 10374 581.75	02/09 10394 146.25
02/07 10355 132.30	02/16 10375 32.50	02/20 10395 200.00
02/23 10356 16.25	02/09 10376 802.10	02/15 10396 80.00
02/09 10357 530.00	02/06 10377 354.25	02/12 10397 26.00
02/09 10358 152.75	02/15 10378 29.25	02/29 10398*

02/14	10359	77.35 02/06	10379	2,050.75 02/28
02/09	10360	55.25 02/09	10380	211.25

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Section IX. Item #3.

(*) INDICATES A GAP IN CHECK NUMBER SEQUENCE

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ACCOUNT:

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Section IX. Item #3.

70015765 02/29/2024

SOCIETY OF BLUFFTON ARTIST INC

INTEREST CHECKING ACCOUNT 70015765

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AVERAGE LEDGER BALANCE:	56,228.43	INTEREST EARNED:	2.23
AVERAGE AVAILABLE BALANCE:	56,056.28	DAYS IN PERIOD:02/01/24-02/29/24:	29
INTEREST PAID THIS PERIOD:	2.08	ANNUAL PERCENTAGE YIELD EARNED:	.05%
INTEREST PAID 2024:	2.08		
INTEREST PAID 2023:	26.33		

Balancing Your Checking Account

This form will assist you in balancing your checking account. Please complete all the information for the Statement Balance and Register Balance forms, and click the Calculate Balance buttons near the bottom of the page. **When the Adjusted Statement and Adjusted Check Register Balances at the bottom of the page equals each other, you have balanced your checking account.** If they do not equal each other, make sure all the information entered is correct and complete, and calculate and compare balances again.

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ACCOUNT:

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Section IX. Item #3.

70022206 02/29/2024

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SOCIETY OF BLUFFTON ARTIST INC
SCHOLARSHIP FUND
SCHOLARSHIP FUND
PO BOX 1972
BLUFFTON SC 29910-1972

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PALMETTO CHECKING ACCOUNT 70022206

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DESCRIPTION	DEBITS	CREDITS	DATE	BALANCE
BALANCE LAST STATEMENT			01/31/24	4,175.74
BALANCE THIS STATEMENT			02/29/24	4,175.74
TOTAL DAYS IN STATEMENT PERIOD 02/01/24 THROUGH 02/29/24:				29
TOTAL CREDITS	(0)	.00		
TOTAL DEBITS	(0)	.00		

- - - ITEMIZATION OF OVERDRAFT AND RETURNED ITEM FEES - - -

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*****
*                                     | TOTAL FOR | TOTAL *
*                                     | THIS PERIOD | YEAR TO DATE *
*-----|-----|-----|-----|
* TOTAL OVERDRAFT FEES: | $ .00 | $ .00 *
*-----|-----|-----|-----|
* TOTAL RETURNED ITEM FEES: | $ .00 | $ .00 *
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ACCOUNT:

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Section IX. Item #3.

70023091 02/29/2024

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SOCIETY OF BLUFFTON ARTIST INC
VS HUGHES ENDOWMENT FUND
PO BOX 1972
BLUFFTON SC 29910-1972

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BUSINESS CHECKING ACCOUNT 70023091

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DESCRIPTION	DEBITS	CREDITS	DATE	BALANCE
BALANCE LAST STATEMENT			01/31/24	3,146.83
BALANCE THIS STATEMENT			02/29/24	3,146.83
TOTAL DAYS IN STATEMENT PERIOD 02/01/24 THROUGH 02/29/24:				29
TOTAL CREDITS	(0)	.00		
TOTAL DEBITS	(0)	.00		

Balancing Your Checking Account

This form will assist you in balancing your checking account. Please complete all the information for the Statement Balance and Register Balance forms, and click the Calculate Balance buttons near the bottom of the page. **When the Adjusted Statement and Adjusted Check Register Balances at the bottom of the page equals each other, you have balanced your checking account.** If they do not equal each other, make sure all the information entered is correct and complete, and calculate and compare balances again.

MINUTES
SOBA Board of Directors
Art School Building
March 18, 2024

Board Members Present: Marie Burgeson, Ann Hyde, Pat Diemand, Jeanne Francisco, Sandy Rhodes, Jane Capraro, Karen Richards, Lin Hilts, Barbara Pecce

Excused: John Kenney

The meeting was called to order by President Marie Burgeson at 10:00 AM

The opening prayer was led by Sandy Rhodes

President's Report – Marie Burgeson: The Anniversary Committee is hard at work. The two “30 on the 30th” events were very successful. The cake and lovely truffles were great and the instructors demonstrated and spoke to visitors emphasizing our classes. This month there will be cupcakes! Permission to do another 20% off in another month or so? It brought in double the sales. We are sending Gala invitations via email to everyone on our email list with a link to buy immediately. Also, we are creating a special invitation to send to VIPs. Sorry to announce Past President Dave Dickson passed away. He was very instrumental in improving SOBA. The Judged Show was great fun and Greg Barnes was such a genial judge who tried to speak to everyone. The reception was very well done despite a broken HVAC again! The parts were under warranty, but the labor was over \$1,000. OTBM (Old Town Bluffton Merchants) have regained control of their website so it should be improving soon with members’ PR.

Discussion: There are Blick Gift Certificates with a total of \$200 left over from the Judged Show. These will be set aside to use as prize(s) for Volunteer of the Year award or similar.

The Anniversary Committee will meet this week. There is a total of 30 tickets sold so far with 10 items for the fashion show.

We need to begin planning for the Annual Meeting which is set for Sunday, May 19th. Possibly Heyward House or other outdoor venue? A committee needs to be in place soon.

MOTION – by Marie that the gallery will hold two additional 20% OFF sales days through the end of 2024. The vote was unanimous to approve.

Vice-President's Report – Karen Richards reported that SOBA will be represented at River Ridge Career Day by members Mary Burrell, Sandra Campeau and Karen Richards. We will be promoting our Art School. We have ordered an additional “bin” for our bin art display and an additional shelving unit for 3-D art in the main gallery. The placement of these new items to be determined. We had 50% of our public click on our last Gala announcement e-mail. The sales statistics compiled by Ginny Cassidy will be published in

an up-coming Newsletter and there will be a note regarding the importance of “Team Spirit”.

2nd Vice President/Secretary Report – Jeanne Francisco reported that there were no revisions requested for the February minutes and the minutes stand approved as written.

One additional satellite gallery has been re-started at the CharterOne Realty Office, 1 Promenade Street in Old Town Bluffton. There are four artists featured there and they will hang until the end of June. There are questions from the Board regarding selection of artists to display at satellite galleries and how to physically handle sales from off-site locations.

The Nominating Committee has spoken directly to 17 members regarding serving on the Board for 2024/25. There has been no response from the general call for nominees. We will close nominations as of Friday, March 29th and begin the interview process. We have the following positions open : Vice-President, Treasurer, Director of Gallery Operations, Director of Community Relations, Director of Staffing. As a Board, please continue to recruit within the membership.

MOTION – by Karen, to setup a committee that will discuss and make recommendations regarding satellite galleries, how to select members to hang in these galleries, how to best set up the system for purchase, and how these potential galleries may or may not differ from the program that has been on-going at Alexander’s. Motion carried unanimously.

The following will be asked to participate in the committee: Jeanne Francisco, Chair, Pat Diemand, Lynda Hawley, Jane Capraro, Karen Richards, Karen Magill, Marie Camenares and Haldora.

Treasurer’s Report – John Kenney (excused) provided a written report attached to the hard copy document.

February 2024:	Total Income	\$24,549.00	Total Cost of Goods Sold	\$14,826.15
	Total Expenses	\$10,288.52	Net Operating Income	(\$1,011.85)

Marie discussed that it is time to reapply for our A-Tax grant. We need to review our allocation for Advertising and Marketing as we have had expenses that have exceeded our budget.

MOTION by Marie that the Board approve our A-Tax grant request of \$40,000 and that the Board pledge to follow the guidelines of the grant application and use the intended funds as stipulated. Unanimous approval.

Membership Director – Jane Capraro provided each Board member a copy of the proposed “Society of Bluffton Artist’s Copyright Liability Contract” for review and comment. There is also an informational page (both copies attached to hard copy). **MOTION** by Jeanne that the Board adopt the use of the “Society of Bluffton Artists Copyright Liability Contract”

agreement with all exhibiting members going forward. Membership will handle the logistics of this procedure and on-going management of the program will be under the direction of the Director of Membership. The vote was unanimous to approve. The cling-on car decals are also now available and will be distributed.

Art School Director – Barbara Pecce stated that to support the class of instructor Greg Barnes, an amount of \$1,000 was utilized from the restricted visiting artist/instructor gift. **MOTION** by Marie to approve this use of funds as stated. The vote was unanimous to approve. Discussion regarding the need to set a detailed plan for the utilization of these specific funds was held with no resolution.

Marketing Director – Ann Hyde presented a written report (attached to the hardcopy).

Community Relations Director – Sandy Rhodes will present her detailed report next month due to time restraints.

Staffing Director – Lin Hilts led a general discussion regarding needs and ideas for extended and improved volunteer staff training. With many additional new members we seem to have a lack of awareness regarding customer service ; ie: people not answering the gallery phone, lack of willingness to go beyond the “volunteer role”, lack of attention to detail and unwillingness to manage a new situation. We are running a business and depend on gallery sales a good bit. Perhaps this concept is not being made clear.

MOTION by Karen that a committee be formed to address the immediate and long-term needs of our gallery volunteers for staff training and development in Customer Service and the role of the membership working in the gallery. The vote was unanimous to approve. Karen will follow-up with assigning this committee.

Display Director – Pat Diemand requested that 10 additional extra long poles be ordered so that we can facilitate getting more art work not the display space.

Old Business: Due to concern regarding the recent termination of Joy Hermann as a jewelry vendor there was discussion regarding how this process was handled. The past minutes do not reflect a vote on her jewelry termination. There was previous discussion only that she was to be notified that our jewelry display space is limited and her sales have been slow. Had we planned to replace her product with another jeweler or offer her a more limited space and add an additional jeweler?

MOTION by Marie for clarification that the Board agrees that at the September 2023 meeting we chose to replace an underperforming jeweler (Joy Hermann) with one felt to be a better choice for the use of our limited gallery 3-D space. Vote: out of 8 members remaining (quorum) 6 voted yes, 2 abstained.

There being no further business the meeting was adjourned by Marie Burgeson at 12:35 PM.

The next meeting is scheduled for Monday, April 15th, 2024 at the home of Marie Burgeson
– 3 Rose Hill Drive, Bluffton.

Submitted by,

Jeanne Francisco, Secretary

ACCOMMODATIONS TAX ADVISORY COMMITTEE

STAFF REPORT

Department of Finance & Administration



MEETING DATE: May 21, 2024
 SUBJECT: Society of Bluffton Artists: 30th Anniversary
 PROJECT MANAGER: Shannon Milroy, Budget, Grants & Procurement Administrator

Summarized below is the application from the Society of Bluffton Artists (SOBA) for Accommodations Tax grant dollars in support of advertising and promotion for the organization's 30th Anniversary.

Total Budget: \$250,846.85

Requested Amount: \$20,000

Percentage of Request^: 8%

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

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Total Budget for Category	Recommended ATAX Funds
Advertising & Promotion of Tourism or Arts and Cultural Events	\$40,000	\$20,000
Facilities for Civic and Cultural Events	-	
Public Facilities	-	
Municipality and County Services	-	*
Tourist Transportation	-	*
Other/Ineligible Project Expenses	210,846.85	
Total	\$250,846.85	\$20,00

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

Budgeted Expenses:

Advertising & Promotion:

Total Budget: \$40,000

- Includes an advertising blitz, social media and news articles with interviews and photos throughout South Carolina as well as adjoining states media contacts.

Other/Ineligible Project Expenses:

Total Budget: \$210,846.85

- Includes art class expenses, artist commissions, operating expenses, insurance, rent, and utilities

Table Rating (Scores 0-5 with 5 satisfying the qualifications best, exception Advertising 0-15)

Amount Recommend	Advertising (15)	Tourism Draw % (5)	Benefit to Tourism (5)	Self- Sufficiency % (5)	Misc. (10)	Total of 40 possible	Comments
\$20,000	11	4	4	5	9	33	

Advertising: This request is 100% related to advertising and promotion. Specifics regarding where the advertising will be placed was not indicated in the application.

Tourism Draw %: Over 70% of gallery guests are from out of the area.

Benefit to Tourism: SOBA sponsors or participates in all local festivals, art walks and everything that Old Town Bluffton Merchants Society schedules.

Self-Sufficiency % (Financial Need): The request is approximately 8% of SOBA's total annual projected budget of \$250,847. Other sources of income include membership dues, the Holiday Boutique, Judge Show and art sales.

Previous Funding Amounts						
Fiscal Year	Requested Amount	% of Budget	Advisory Committee Recommendation	Town Council Approved	Expended	Comments
2023	\$15,000	50%	\$15,000	\$15,000	\$14,402.49	
2022	\$16,063	50%	\$16,063	\$16,063	\$15,178.16	
2021	\$20,000	60%	\$18,200	\$18,200	\$18,200	

Accommodations Tax Committee Recommendations and Comments:

The Committee recommends funding \$20,000 for advertising and promotion of tourism.

Milroy, Shannon

From: noreply@civicplus.com
Sent: Wednesday, March 27, 2024 12:20 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	3/27/2024
Full Legal Organization Name	Hilton Head Symphony Orchestra, Inc.
Project Name	Hilton Head Symphony Orchestra 2024 Bluffton Concerts
Total Project Costs	\$89,710
Total ATAX Funds Requested	\$43,632
Percent of Total Budget	48.64%
Address	7 Lagoon Road

Street Address Line 2	Suite 100
City	Hilton Head Island
State	SC
Zip Code	29928

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.

[501C-3 letter 2008-02-07.pdf](#)

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

[Bluffton Business License exp. 2024-04-30.pdf](#)

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Organization Primary Point of Contact

First Name	Alan
Last Name	Jordan
Title	President and CEO
Phone Number	8438422055
E-mail Address	ajordan@hhso.org

(Section Break)

Organization Secondary Point of Contact

First Name	<i>Field not completed.</i>
Last Name	<i>Field not completed.</i>
Title	<i>Field not completed.</i>
Phone Number	<i>Field not completed.</i>

E-mail Address *Field not completed.*

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Project Description: The Hilton Head Symphony Orchestra will present two concerts in Bluffton during 2024 as part of its 2024-2025 concert season. On Thursday, October 17, 2024, the HHSO will produce a free outdoor pops concert at Martin Family Park as the opening event of the final weekend of the Historic Bluffton Arts and Seafood Festival—the fourth such annual partnership. On Saturday, November 30, 2024, the HHSO will perform a Holiday Pops Concert at the St. Gregory the Great Catholic Church Parish Life Center with reasonably-priced tickets to appeal to families visiting during the holidays. Both concerts will be conducted by Music Director John Morris Russell. Vocal soloists will be engaged for the concerts and the Hilton Head Symphony Orchestra Chorus will be featured during the Holiday Pops Concert.

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 Historic Bluffton Arts and Seafood Festival is a traditional mainstay of the region’s cultural calendar, drawing 25,000 visitors to downtown Bluffton during the 9-day festival. The free outdoor pops concert is primarily designed to enhance the visitor experience, and it is anticipated to draw approximately 1,100 people, with 20% of them identified as tourists. Out-of-town patrons regularly attend HHSO presentations, both in Bluffton and on Hilton Head Island. As has been done previously, residency data will be collected at this free outdoor performance through an online contest with winners receiving prizes (i.e., restaurant and retail store gift certificates). Attendees will be encouraged to complete a brief and fun contest on their mobile devices. Demographic data will be drawn from these contest submissions, analyzed, and reported. The HHSO has presented Holiday Pops concerts at St. Gregory the Great in 2019, 2021, 2022, and 2023, to capacity crowds that drew tourists, visitors, and residents during the Thanksgiving holiday weekend. 401 audience members attended the 2023 presentation, with 4.53% of these identified as tourists. [A significant number of the tickets purchased by

residents were for large groups—several of five or six—suggesting that out-of-town visitors (some of whom may have stayed in Bluffton hotels) were holiday guests of these local ticket-buyers.] Residency data was, and will be, collected at the time of ticket purchase. The two concerts will be promoted widely, with flyers liberally distributed in area hotels, vacation rental offices, restaurants, retail spaces, and at the Savannah/Hilton Head International Airport and at interstate rest areas across South Carolina; paid local and regional print and broadcast advertising (in coordination with Historic Bluffton Arts and Seafood Festival marketing for the October concert) and through an aggressive social media campaign.

“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:	10/17/2024 - 11/30/2024
Multi-Year Project/Event?	No
Permits Required, if any:	(required permits will be secured by Historic Bluffton Arts and Seafood Festival for the October 17, 2024 concert)
Additional Comments:	The HHSO continues to work on the long-range goal of regular, annual concerts presented in Bluffton, complementing its traditional performances on Hilton Head Island, in an effort to broaden its reach throughout Beaufort County, especially “South of the Broad.” Bluffton also represents a closer and more convenient destination for visitors from Savannah, Beaufort, and beyond. Of course, the HHSO also is working to build its legion of fans who consider Bluffton home. With the experiences of the first three years of Outdoor Pops concerts in October, 2021, 2022, and 2023, and our developing collaboration with the Arts and Seafood Festival, the HHSO and the Festival are both in better positions to improve promotion and logistical partnerships to increase concert participation and support.

We are requesting support in the amount of \$43,632 to pay for the following expenses:

- venue rental of \$500;
- port-o-lets rental of \$259 (pro-rated at est. tourist percentage);
- tent, stage, and HVAC rentals of \$21,439;
- sound and lighting equipment rental of \$5,011;
- media advertising of \$14,172; and
- print materials and program inserts of \$2,251 (that will also extend the promotion beyond the live performance).

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

FINANCIAL INFORMATION

Project/Event Line Item Budget	2024 Project Budget.pdf
Most Recent Fiscal Year Balance Sheet and Profit and Loss Accounting Statement	Audit 2023-06-30 HHSO.pdf
Financial Guarantee	Minutes 2024-03-21.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	Pro-Rated Annual Fund
Amount/Value	\$12,500
Contribution	Other Income (General Funds)
Amount/Value	\$1,500

(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

If yes, please list all sources and amounts:

Funding Source	Table/Ticket Sales
----------------	--------------------

Amount	\$13,500
--------	----------

Funding Source	Sponsorship/Underwriting
----------------	--------------------------

Amount	\$18,000
--------	----------

Funding Source	<i>Field not completed.</i>
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Amount	<i>Field not completed.</i>
--------	-----------------------------

Funding Source	<i>Field not completed.</i>
----------------	-----------------------------

Amount	<i>Field not completed.</i>
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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	Hilton Head Symphony Orchestra 2023 Concerts
--------------------	--

Year	2023
------	------

Amount Awarded	48,628
----------------	--------

Was project completed? Yes

How were the funds used? The HHSO presented an outdoor pops concert on Thursday, October 19, 2023, at Martin Family Park, and a Holiday Pops Concert at the St. Gregory the Great Catholic Church Parish Life Center on Saturday, November 25, 2023.

What impact did this project/event have on the community or benefit tourism? Describe how the tourism data was measured. These events were advertised in the Bluffton Sun, Hilton Head Sun, Local Life, on WTOC, and WHHI, on South Carolina Public Radio, and through multiple social media communications including promotion to our 5,000+ e-mail list derived from area residents, visitors, and tourists who attend our events. They were also included in season brochures, widely distributed (including at the Savannah/Hilton Head International Airport) and on rack cards distributed to Bluffton hotels and downtown businesses. We retrieved addresses from direct telephone and online ticket purchases. Based on contest responses, 86 (7.44%) of the estimated 1,000 attendees of our October 19, 2023, performance were tourists. For the November 25, 2023, concert, 18 (4.53%) attendees were tourists. As noted elsewhere, the number of tourists and visitors for November 25, 2023, is very likely larger, since tickets purchased by residents often included large groups; we believe many of these Thanksgiving holiday guests were out-of-town visitors.

We were disappointed that our tourist percentages at both performances decreased from our 2022 levels. Working with our Historic Bluffton Arts and Seafood Festival partners and media outlets, we will strategize ways to boost those percentages closer to 2022 levels.

(Section Break)

Please provide the project/event budgets for the previous two (2) years. [2023 and 2022 Project Budget v. Actual.pdf](#)

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	Alan Jordan
Signatory's Title or Position	President and CEO

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

Internal Revenue Service
P.O. Box 2508
Cincinnati, OH 45201

Department of the Treasury

Date: FEB 08 2007

Person to Contact:

Jo Ann Cunningham
ID# 31-07757

Toll Free Telephone Number:

877-829-5500

Employer Identification Number:

57-0761297

HILTON HEAD SYMPHONY ORCHESTRA INC
32 OFFICE PARK ROAD STE 214
HILTON HEAD ISLAND, SC 29928

Dear Sir or Madam:

This is in response to your request of January 23, 2007, regarding your name and address change. We have updated our records to change your name from Hilton Head Orchestra Inc to Hilton Head Symphony Orchestra Inc.

Our records indicate that a determination letter was issued in December 1984 that recognized you as exempt from Federal income tax, and reflect that you are currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records also indicate you are not a private foundation within the meaning of section 509(a) of the Code because you are described in sections 509(a)(1) and 170(b)(1)(A)(vi).

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.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,



Cindy Westcott
Manager, Exempt Organizations
Determinations

TOWN OF BLUFFTON

September 11, 2023

DATE ISSUED

April 30, 2024

EXPIRES

LIC-09-23-052015

LICENSE NUMBER

019155-2023

BUSINESS ID

Hilton Head Symphony Orchestra, Inc.

COMPANY NAME

Hilton Head Symphony Orchestra

DBA NAME

Musical Groups and Artists

BUSINESS TYPE

Musical Performances, Education and Community Outreach

DESCRIPTION/CONDITIONS

7 Lagoon RD 100
Hilton Head Island SC 29928

BUSINESS LOCATION

PO Box 5757
Hilton Head Island SC 29938

MAILING LOCATION

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.

Section 6-21 Purpose and Duration of Business License

The business license levied by this ordinance is for the purpose of providing such regulation as may be required for the business subject thereto and for the purpose of raising revenue for the general fund through a privilege tax. Each license shall be issued for one (1) calendar year ending December 31. The provisions of this ordinance and the rates herein shall remain in effect from year to year as amended by Town Council.

Renewal Process

Renewal notices are mailed in January of each year to all active businesses.

Section 6-22-A License Tax

The required license tax shall be paid for each business subject hereto according to the applicable rate classification on or before the thirtieth (30th) day of April in each year.

Hilton Head Symphony Orchestra
PO Box 5757
Hilton Head Island SC 29938

Construction within the Town of Bluffton
shall only occur during the hours of
7:00am - 7:00pm Monday thru Saturday
and 12:00pm - 7:00pm on Sunday



HILTON HEAD SYMPHONY ORCHESTRA
2024 BLUFFTON CONCERTS PROJECT BUDGET
March 27, 2024

Attac Section IX. Item #3.

	Outdoor Pops-October		Holiday Pops		TOTAL
Revenues					
Table/Ticket Sales	\$1,500	\$1,500		\$12,000	\$13,500
Private Support		\$25,000		\$5,500	\$30,500
Sponsorship and Underwriting	\$15,000		\$3,000		\$18,000
Pro-rated Annual Fund	\$10,000		\$2,500		\$12,500
Public Support		\$35,420		\$8,212	\$43,632
Other Income		<u>\$1,500</u>		<u>\$0</u>	<u>\$1,500</u>
TOTAL REVENUES		\$63,420		\$25,712	\$89,132
Expenses					
Artistic		\$23,716		\$10,036	\$33,752
Guess Artist Expenses	\$2,250		\$1,628		\$3,878
Orchestra Musician Expenses	\$21,466		\$8,408		\$29,874
Production		\$28,342		\$2,150	\$30,492
Production Labor and Security			\$500		\$500
Venue Rental	\$0 *		\$500 *		\$500 *
Port-O-Lets	\$1,292 *		\$0		\$1,292 *
Tent, Stage, and HVAC	\$21,439 *		\$0		\$21,439 *
Sound and Lighting	\$4,611 *		\$400 *		\$5,011 *
Music Library	\$1,000		\$750		\$1,750
Marketing		\$9,111		\$7,312	\$16,424
Media Advertising	\$7,503 *		\$6,669 *		\$14,172 *
Print Materials/Program Inserts	\$1,608 *		\$643 *		\$2,251 *
Development		\$0		\$0	\$0
General & Administrative		<u>\$6,117</u>		<u>\$2,925</u>	<u>\$9,042</u>
TOTAL EXPENSES		<u>\$67,286</u>		<u>\$22,424</u>	<u>\$89,710</u>
NET PROFIT/(LOSS)		(\$3,866)		\$3,289	(\$576)

* - allowable expense for which Bluffton ATAX Funds are requested

HILTON HEAD SYMPHONY ORCHESTRA, INC.

FINANCIAL STATEMENTS

Years Ended June 30, 2023 and 2022

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70 MAIN STREET • SUITE 100
HILTON HEAD ISLAND, SC 29926

181 BLUFFTON ROAD • A-104
BLUFFTON, SC 29910

MEMBER
AMERICAN INSTITUTE OF CPAs
S.C. ASSOCIATION OF CPAs

INDEPENDENT AUDITOR'S REPORT

TELEPHONE: (843) 681-4430
FAX: (843) 681-4425
EMAIL: pcarey@pcareycpa.com

To the Board of Directors
Hilton Head Symphony Orchestra, Inc.
Hilton Head Island, South Carolina

Opinion

We have audited the accompanying financial statements of Hilton Head Symphony Orchestra, Inc. (a nonprofit organization), which comprise the statements of financial position as of June 30, 2023, and the related statements of activities and changes in net assets, functional expenses and cash flows for the year then ended, and the related notes to the financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Hilton Head Symphony Orchestra, Inc. as of June 30, 2023, and the results of its operations and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of Hilton Head Symphony Orchestra, Inc., and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about Hilton Head Symphony Orchestra, Inc.'s ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

Exercise professional judgment and maintain professional skepticism throughout the audit.

Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.

Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of Hilton Head Symphony Orchestra, Inc.'s internal control. Accordingly, no such opinion is expressed.


Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.

Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about Hilton Head Symphony Orchestra, Inc.'s ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

Report on Summarized Comparative Information

We have previously audited the Hilton Head Symphony Orchestra, Inc.'s financial statements for the year ended June 30, 2022 and we expressed an unmodified audit opinion on those audited financial statements in our report dated August 8, 2022. In our opinion, the summarized comparative information presented herein as of and for the year ended June 30, 2022, is consistent, in all material respects, with the audited financial statements from which it has been derived.


Carey & Company, P.A.
July 24, 2023

HILTON HEAD SYMPHONY ORCHESTRA, INC.
STATEMENTS OF FINANCIAL POSITION
As of June 30, 2023 and 2022

ASSETS		Summarized Information
	2023	2022
Current Assets		
Cash and equivalents	\$ 537,607	\$ 548,267
Pledge and other receivables	28,250	1,500
Prepaid expenses	11,801	13,482
Total Current Assets	<u>577,658</u>	<u>563,249</u>
Property And Equipment		
Furniture, fixtures and equipment	138,226	137,208
Leasehold improvements	841,252	841,252
Accumulated depreciation	(636,868)	(507,263)
Total Property And Equipment	<u>342,610</u>	<u>471,197</u>
Other Assets		
Foundation endowment fund	218,330	214,074
Investments:		
Board designated quasi-endowment fund	332,001	180,687
Donor restricted	622,393	515,768
Total Investments	<u>954,394</u>	<u>696,455</u>
Operating lease right-of-use-asset	201,917	-
Security deposits	17,790	17,790
TOTAL ASSETS	<u>\$ 2,312,699</u>	<u>\$ 1,962,765</u>
LIABILITIES AND NET ASSETS		
Current Liabilities		
Accounts payable	\$ 13,392	\$ 17,944
Line of credit	50,000	-
Operating lease liability	131,521	-
Payroll taxes payable	10,683	13,230
Deferred ticket revenues	195,539	163,962
Deferred contribution and fundraising revenues	436,372	267,740
Total Current Liabilities	<u>837,507</u>	<u>462,876</u>
Operating lease liability, net of current portion	<u>70,396</u>	<u>-</u>
TOTAL LIABILITIES	<u>907,903</u>	<u>462,876</u>
Net Assets		
Without donor restrictions:		
Undesignated	232,062	589,362
Board designated	332,001	180,687
Total Net Assets Without Donor Restrictions	<u>564,063</u>	<u>770,049</u>
With donor restrictions	840,733	729,840
Total Net Assets	<u>1,404,796</u>	<u>1,499,889</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 2,312,699</u>	<u>\$ 1,962,765</u>

See accompanying notes and independent auditor's report.

HILTON HEAD SYMPHONY ORCHESTRA, INC.
STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS
Years Ended June 30, 2023 and 2022

Attac

Section IX. Item #3.

	2023			Summarized Information 2022
	Without Donor Restrictions	With Donor Restrictions	Total	
REVENUE AND SUPPORT				
Admissions	\$ 595,360	\$ -	\$ 595,360	\$ 538,343
PPP loan forgiveness	-	-	-	201,600
Contributions and grants	871,394	343,069	1,214,463	1,104,313
Government support	532,882	-	532,882	909,576
Fundraising and other support	169,727	30,060	199,787	252,074
Investment income (loss)	31,815	68,284	100,099	(119,705)
Restrictions satisfied by payments	330,520	(330,520)	-	-
Total Revenue and Support	<u>2,531,698</u>	<u>110,893</u>	<u>2,642,591</u>	<u>2,886,201</u>
EXPENSES				
Program	1,968,744	-	1,968,744	1,790,957
Management and general	671,119	-	671,119	648,133
Marketing and development	97,821	-	97,821	76,619
Total Expenses	<u>2,737,684</u>	<u>-</u>	<u>2,737,684</u>	<u>2,515,709</u>
INCREASE (DECREASE) IN NET ASSETS	(205,986)	110,893	(95,093)	370,492
NET ASSETS AT BEGINNING OF YEAR	<u>770,049</u>	<u>729,840</u>	<u>1,499,889</u>	<u>1,129,397</u>
NET ASSETS AT END OF YEAR	<u>\$ 564,063</u>	<u>\$ 840,733</u>	<u>\$ 1,404,796</u>	<u>\$ 1,499,889</u>

See accompanying notes and independent auditor's report.

HILTON HEAD SYMPHONY ORCHESTRA, INC.
 STATEMENTS OF FUNCTIONAL EXPENSES
 Years Ended June 30, 2023 and 2022

Attac

Section IX. Item #3.

	2023				Summarized Information 2022
	<u>Program Services</u>	<u>Management and General</u>	<u>Marketing and Development</u>	<u>Total</u>	
Salaries and wages	\$ 710,359	\$ 324,371	\$ 36,563	\$ 1,071,293	\$ 966,358
Payroll taxes and related benefits	<u>111,718</u>	<u>27,142</u>	<u>3,059</u>	<u>141,919</u>	<u>129,763</u>
Total payroll and benefits	822,077	351,513	39,622	1,213,212	1,096,121
Facilities cost	274,949	67,533	-	342,482	343,272
Contract services	306,738	16,024	-	322,762	293,946
Marketing and advertising	74,689	74,689	-	149,378	130,609
Performance production costs	129,920	-	-	129,920	154,277
Travel and lodging	156,297	-	-	156,297	61,965
Prizes, judges and awards	63,489	-	-	63,489	87,832
Fundraising	-	-	55,364	55,364	64,134
Office	8,504	36,575	2,835	47,914	45,041
Bank fees	-	16,851	-	16,851	15,605
Depreciation	90,723	38,881	-	129,604	129,449
Other	<u>41,358</u>	<u>69,053</u>	<u>-</u>	<u>110,411</u>	<u>93,458</u>
Total expenses	<u>\$ 1,968,744</u>	<u>\$ 671,119</u>	<u>\$ 97,821</u>	<u>\$ 2,737,684</u>	<u>\$ 2,515,709</u>

See accompanying notes and independent auditor's report.

HILTON HEAD SYMPHONY ORCHESTRA, INC.
STATEMENTS OF CASH FLOWS
Years Ended June 30, 2023 and 2022

Attac

Section IX. Item #3.

	2023	Summarized Information 2022
CASH FLOWS FROM OPERATING ACTIVITIES		
Change in net assets	\$ (95,093)	\$ 370,492
Adjustments to reconcile change in net assets to net cash used by operating activities:		
Investment (income) loss	(100,099)	119,705
Noncash contribution of property and equipment	-	(5,353)
Depreciation expense	129,605	129,449
Operating lease amortization	(201,917)	-
Proceeds from Paycheck Protection Program	-	(201,600)
Increase (decrease) in assets		
Pledge and other receivables	(26,750)	28,455
Prepaid expenses and security deposits	1,682	(13,482)
Increase (decrease) in liabilities:		
Accounts payable	(4,552)	(49,572)
Operating lease liability	201,917	-
Payroll taxes payable	(2,547)	4,647
Deferred revenues	200,209	324,245
Net Cash Provided By Operating Activities	<u>102,455</u>	<u>706,986</u>
CASH FLOWS FROM INVESTING ACTIVITIES		
Purchase of property and equipment	(1,018)	-
Net change in investments	(172,348)	(264,174)
Cash released from foundation endowment fund	10,251	9,856
Net Cash Used By Investing Activities	<u>(163,115)</u>	<u>(254,318)</u>
CASH FLOWS FROM FINANCING ACTIVITIES		
Net proceeds from line of credit	50,000	-
Net Cash Provided By Financing Activities	<u>50,000</u>	<u>-</u>
NET INCREASE (DECREASE) IN CASH AND CASH EQUIVALENTS	(10,660)	452,668
CASH AND CASH EQUIVALENTS AT BEGINNING OF YEAR	548,267	95,599
CASH AND CASH EQUIVALENTS AT END OF YEAR	<u>\$ 537,607</u>	<u>\$ 548,267</u>
SUPPLEMENTAL DISCLOSURES - cash payments for:		
Interest	\$ 199	\$ -
Income taxes	\$ -	\$ -

See accompanying notes and independent auditor's report.

NOTE A - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Nature of Organization

The Hilton Head Symphony Orchestra, Inc. (the "Orchestra") is located on Hilton Head Island, South Carolina and is a nonprofit organization dedicated to presenting annual seasons of symphonic subscription concerts, as well as special concerts and educational and community engagement programs.

Basis of Accounting

The accompanying financial statements have been prepared on the accrual basis of accounting.

Basis of Presentation

The accompanying financial statements of the Orchestra have been prepared in accordance with accounting principles generally accepted in the United States of America. Accordingly the Orchestra reports information regarding its financial position and activities according to the following net asset classifications:

Net Assets without donor restrictions - Net assets that are not subject to donor-imposed restrictions and may be expended for any purpose in performing the primary objectives of the organization. These net assets may be used at the discretion of the Orchestra's management and the board of directors.

Net Assets with donor restrictions - Net assets subject to stipulations imposed by donors, and grantors. Some donor restrictions are temporary in nature; those restrictions will be met by actions of the Orchestra or by passage of time. Other donor restrictions are perpetual in nature, whereby the donor has stipulated the funds be maintained in perpetuity.

Revenue Recognition

Contributions received are recorded as increases in net assets without or with donor restrictions depending on the existence and/or nature of the donor restrictions. Donor restricted contributions reported as increases in net assets with donor restrictions represent contributions for specific activities (youth and outreach programs, piano competition program, etc) and are released as support during either the current year or subsequent years depending on the nature of the restrictions.

Revenue from ticket sales and donations related to concert seasons are recognized as revenue in the applicable concert season, which is held from October to May. Accordingly deferred revenue represents ticket sales and donations received in advance of the applicable concert season. For the years ended June 30, 2023 and 2022, ticket sales of \$195,539 and \$163,962 from previous fiscal year deferred revenue were recognized, respectively.

Leases

Effective for the year beginning July 1, 2022, or if adopted earlier, the Financial Accounting Standards Board (FASB) issued Accounting Standards Code 842 (ASC 842) which requires presenting Right of Use Assets (ROU) on the balance sheet. ASC 842 supersedes the guidance applied under ASC 840, which was the method in place for the year ended June 30, 2022. The Orchestra determines if an arrangement is a lease at inception. Operating leases are included in ROU lease assets, which represent the Orchestra's right to use an underlying asset for the lease term, and lease obligations represent the Orchestra's obligation to make lease payments arising from the lease. Operating ROU lease assets and obligations are recognized at the commencement date based on the present value of lease payments over the lease term. Lease expense for lease payments is recognized on straight-line basis over the lease of the term.

NOTE A - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES - CONTINUED

Cash and Cash Equivalents

For purposes of the statement of cash flows, cash and cash equivalents include money market accounts and highly liquid debt instruments with an original maturity of three months or less.

Investments

Investments in marketable securities and debt securities are reported at their fair values in the statement of financial position. Unrealized gains and losses are included in the statement of changes in net assets.

Fair Value Measurement

Fair value as defined under generally accepted accounting principles is an exit price, representing the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. Generally accepted accounting principles require a three tier fair value hierarchy, which prioritizes the inputs used in measuring fair value. Those tiers include:

Level 1 - Observable inputs such as quoted prices in active markets.

Level 2 - Inputs other than quoted prices in active markets that are either directly or indirectly observable.

Level 3 - Unobservable inputs about which little or no market data exists, therefore requiring an entity to develop its own assumptions.

Assets and liabilities are classified in their entirety based on the lowest level of input that is significant to the fair value measurement.

Promises to Give

The Orchestra conducts an annual giving campaign during which it solicits pledges from local businesses which are featured in the annual program. These pledges do not meet the criteria for income recognition under generally accepted accounting principles, and are not reflected in the statement of activities until they are collected.

Contributions that are restricted by the donor are classified as increases to net assets with restrictions. When the restrictions expire, restricted net assets are reclassified to net assets without restrictions.

Property, Plant and Equipment

Property, plant and equipment are stated at cost and depreciated using the straight-line method over their estimated useful lives. Contributed property, plant and equipment are recorded at their fair value on the date of the gift as unrestricted support.

Contributed Services

The Orchestra receives a substantial amount of services donated by its members in carrying out the Orchestra's mission. No amounts have been reflected in the financial statements for those services since they do not meet the criteria for recognition.

Use of Estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

NOTE A - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES - CONTINUED

Income Taxes

The Orchestra is a not-for-profit corporation that is generally exempt from federal and state income taxes under Section 501(c)(3) of the Internal Revenue Code.

Functional Allocation of Expense

The cost of providing the various programs and other activities have been summarized on a functional basis in the statements of functional activities and in the statement of functional expenses. Accordingly, certain costs have been allocated among the program and supporting services benefited using reasonable ratios determined by management.

NOTE B - FOUNDATION ENDOWMENT FUND

The Community Foundation of the Lowcountry, Inc. (the "Community Foundation") acts in an agency capacity for the Orchestra in order to provide permanent stewardship, management and oversight of certain Orchestra investments. The fund is invested by the Community Foundation in a pool of marketable securities and reported at fair value, which is the closing price reported on the active market on which the individual securities are traded. Fair value of the fund is determined based upon the Orchestra's allocated share of the Community Foundation's investment pool. Fair value for the fund is categorized as Level 1 under the fair value measurement hierarchy and was \$218,330 and \$214,074 at June 30, 2023 and 2022, respectively. The annual withdrawal amount is limited to 4.5% of the average fair market value of the account and totaled \$10,251 and \$9,856 for the years ended June 30, 2023 and 2022, respectively. Net investment income (loss) was \$14,507 and (\$48,787) for the years ended June 30, 2023 and 2022, respectively.

In addition, the Community Foundation maintains a fund established by a donor which is designated for the benefit of the Orchestra as long as the Orchestra, or its purpose, continues to serve the public interest. Under generally accepted accounting principles the Orchestra can not recognize these funds as contributions until the right to receive is unconditional or the amounts are received. At June 30, 2023 and 2022, the fair market value of this fund was \$183,708 and \$180,100, and respectively. The annual withdrawal amount from this fund is limited to 4.5% of the average fair market value of the account and totaled \$8,267 and \$8,291 for the years ended June 30, 2023 and 2022, respectively.

NOTE C - LIQUIDITY AND AVAILABILITY OF FINANCIAL ASSETS

Financial assets as of June 30 are as follows:

	2023	2022
Cash and equivalents	\$ 537,607	\$ 548,267
Foundation endowment fund	218,330	214,074
Investments	954,394	696,455
Total Financial Assets	<u>\$ 1,710,331</u>	<u>\$ 1,458,796</u>

NOTE C - LIQUIDITY AND AVAILABILITY OF FINANCIAL ASSETS - CONTINUED

At June 30, 2023 and 2022, financial assets of approximately \$1,490,000 and \$1,240,000, respectively, were available to meet general expenditures over the next twelve months. Amounts not available for general expenditure over the next twelve months include an amount in the Community Foundations endowment fund which is not available for distribution.

The Orchestra maintains funds in banks to maximize liquidity, minimize risk and aligned to meet short term requirements.

NOTE D - INVESTMENTS

Cost and market values as of June 30 are summarized as follows:

		2023	
		Cost	Fair Value
<u>Investments:</u>			
Marketable securities	\$	814,807	\$ 937,272
Cash		17,122	17,122
Total Other Investments	\$	<u>831,929</u>	<u>\$ 954,394</u>
		2022	
		Cost	Fair Value
<u>Investments:</u>			
Marketable securities	\$	491,535	\$ 598,517
Cash		97,930	97,938
Total Other Investments	\$	<u>589,465</u>	<u>\$ 696,455</u>

Investments in marketable securities are reported at fair market value based upon quoted prices in active markets and are categorized as Level 1 under the fair value measurement hierarchy. Investment return for the years ended June 30, 2023 and 2022, including the Foundation Endowment Fund disclosed in Note B, are summarized as follows:

	2023	2022
Investment earnings	\$ 63,899	\$ 25,947
Investment expenses	(10,580)	(5,667)
Unrealized investment gain (loss)	32,273	(91,198)
Foundation Endowment Fund	14,507	(48,787)
Total investment return (loss)	<u>\$ 100,099</u>	<u>\$ (119,705)</u>

NOTE E - BOARD DESIGNATED QUASI ENDOWMENT FUND

In 2022, the Orchestra's Board of Directors established and initially funded an Endowment Fund for the purpose of increasing the Orchestra's restricted fund base. The investments of the Endowment Fund can be used for specific defined purposes only with the approval of the Board of Directors.

A summary of the Endowment Fund at June 30, is as follows:

	2023	2022
Beginning balance	\$ 180,687	\$ -
Contributions	543,374	196,346
Withdrawals	(415,069)	-
Investment earnings	12,546	1,901
Investment expenses	(4,925)	(25)
Unrealized investment gain (loss)	15,388	(17,535)
Total Other Investments	<u>\$ 332,001</u>	<u>\$ 180,687</u>

The Endowment Fund investments are professionally managed by a wealth management firm subject to the guidance and oversight of the Orchestra's Board of Directors.

NOTE F - CONCENTRATION OF CREDIT RISK

The Orchestra maintains its cash balances at several financial institutions. The FDIC covers \$250,000 for substantially all depository accounts. At June 30, 2023 and 2022, the Orchestra has uninsured balances of \$240,178 and \$260,628, respectively.

Cash balances at brokerage firms are insured by SIPC up to \$250,000 and marketable securities at up to \$500,000. Private insurance provided by the brokerage firm covered balances in excess of these limits.

NOTE G - FINANCING ARRANGEMENTS

The Orchestra has a \$50,000 line of credit with its bank that is renewed annually on January 1. Borrowings under the line of credit bear interest at 9.25% and are uncollateralized. At June 30, 2023 and 2022, the balance was \$50,000 and \$0, respectively. On July 3, 2023, subsequent to year end, the balance of the line of credit was paid in full.

NOTE H - PROPERTY AND EQUIPMENT

Property and equipment consist of the following as of June 30:

	2023	2022
Leasehold improvements	\$ 841,252	\$ 841,252
Computer equipment	17,800	17,800
Office furniture and equipment	37,744	36,726
Performance equipment	82,682	82,682
Total property and equipment	979,478	978,460
Accumulated depreciation	(636,868)	(507,263)
Net property and equipment	<u>\$ 342,610</u>	<u>\$ 471,197</u>

Depreciation expense for the year ended June 30, 2023 and 2022 was \$129,604 and \$129,449, respectively.

NOTE I - REAL PROPERTY LEASE AGREEMENTS

On March 1, 2022, the Orchestra entered into a lease for offices and performance center located in Hilton Head, South Carolina. The lease has a term of three years that expires in 2025, with an option to extend for an additional three years. Under the lease, the Orchestra is required to make monthly payments of basic rent and an additional amount for taxes, insurance and common area maintenance. Annual office lease expense was \$181,734 and \$195,771 for the years ended June 30, 2023 and 2022, respectively.

Leases (ASC) 842

Future minimum annual lease payments due over the term of the lease as of June 30, 2023:

2024	\$ 131,521
2025	90,347
Total undiscounted minimum lease payments	221,868
Less Discounts to present value	(19,951)
Total operating lease liability	<u>\$ 201,917</u>

As of June 30, 2023, the weighted-average remaining lease term for the operating leases is 1.8 years. The Orchestra utilized its incremental borrowing rate as the risk-free rate. The risk-free rate associated with the operating leases as of June 30, 2023 was 4%.

NOTE I - REAL PROPERTY LEASE AGREEMENTS - CONTINUED

Leases (ASC) 840

Future minimum annual lease payments due over the term of the lease as of June 30, 2022:

2023	\$	131,314
2024		131,521
2025		90,347
Total lease payments	\$	<u>353,182</u>

Concert and rehearsal locations are leased on a seasonal basis primarily at First Presbyterian Church of Hilton Head, SC. Annual concert and rehearsal lease expense for all such facilities was \$73,472 and \$89,629 for the years ended June 30, 2023 and 2022, respectively.

NOTE J - PAYCHECK PROTECTION PROGRAM

During the year ended June 30, 2021, the Orchestra received \$201,600 in proceeds from a Paycheck Protection Program loan ("PPP") from the Small Business Administration ("SBA"). On September 10, 2021, the principal amount of the loan and related interest was forgiven. The \$201,600 was recognized as revenue in the year ended June 30, 2022.

NOTE K - EMPLOYEE RETENTION CREDIT

The Organization applied for COVID-19 relief from the Employee Retention Credit (ERC) program during the years ended June 30, 2023 and 2022. The ERC, which allows an eligible employer for qualifying wages a credit against certain payroll taxes, was established by the CARES Act and further amended by the Consolidated Appropriations Act (CAA) and the American Rescue Plan (ARP). Under the program, the Organization determined it was eligible for a \$14,576 and \$42,679 credit for calendar years 2020 and 2021, respectively. The credits have been recognized as revenue in the year in which received.

NOTE L - COMMITMENTS

The Orchestra has an independent contractor agreement in place with its Music Director which provides for annual increases in compensation plus additional amounts for performances if required beyond those scheduled in the agreement. The previous agreement expired June 30, 2022, and the new agreement was executed for the period of July 1, 2022 through June 30, 2025.

The Orchestra musicians are employed pursuant to the terms and conditions of a three-year wage scale and pension plan contract with the American Federation of Musicians Local 447-704. The agreement to end June 30, 2025, was ratified on October 11, 2022.

NOTE M - ACCOUNTING FOR UNCERTAINTY IN INCOME TAXES

The Orchestra evaluated all tax positions that could have a significant effect on the financial statements and determined that there are no uncertain tax positions at June 30, 2023.

NOTE N - NET ASSETS

Net assets with donor restrictions were available for the following purposes as of June 30:

	2023	2022
International Piano Competition	\$ 26,270	\$ 24,865
Youth programs	596,133	490,901
Permanent endowment fund	218,330	214,074
Total net assets	<u>\$ 840,733</u>	<u>\$ 729,840</u>

NOTE O - RELATED PARTY TRANSACTIONS

The Orchestra used a consultant for Orchestra related administration, which a Board member's wife is the owner. Additionally, another board member was paid for performance fees. The consulting services and performance fee expenses for June 30, 2023 and 2022 were \$7,700 and \$11,850, respectively.

NOTE P - SUBSEQUENT EVENTS

The Orchestra has evaluated subsequent events through July 24, 2023, in connection with the preparation of these financial statements, which is the date the financial statements were available to be issued.

**HILTON HEAD SYMPHONY ORCHESTRA
EXECUTIVE COMMITTEE
MEETING MINUTES: Thursday, March 21, 2024**

The meeting was held in the SoundWaves Board Room, with Carol Hack, Arthur Handman, Mike Harter, Eric Magnin, and Alan Jordan attending in person. Bob Cherichella was unavailable due to travel obligations.

Harter called the meeting to order at 10:04 am.

It was moved by Hack, and seconded by Magnin, that the minutes of the February 15, 2024, meeting be approved as presented; motion passed (Handman abstained).

The February 29, 2024, Financial Report was reviewed. A prolonged discussion ensued about future strategic programming adjustments that could positively impact future years' budgets.

Handman reported on the Finance Committee's discussion of increasing the threshold for requirement of a second signature on checks and e-checks. **It was moved by Magnin, and seconded by Handman, that the Executive Committee recommend to the Board at its March 28, 2024, meeting that the threshold be increased from \$2,500 to \$5,000 for second signatures on HHSO checks and e-checks; motion passed.**

The Board of Directors meeting agenda was reviewed, with additions for reporting on an anticipated line of credit draw, the check signature recommendation, and a Board Development Committee report.

Upon a request from Jordan, **it was moved by Hack, and seconded by Handman, that the Executive Committee act on behalf of the Board of Directors and approve submission of a grant request of \$43,632 to the Town of Bluffton Accommodations Tax Advisory Committee for calendar year 2024; motion passed.**

Because of some members' conflicts, the next meeting was re-scheduled to take place on **Tuesday, April 23, 2024**, at 10:00 am in the SoundWaves Board Room.

There being no further business, **the meeting was adjourned by consensus at 11:02 am.**

Respectfully submitted,



Alan Jordan, President and CEO



ACCOMMODATIONS TAX ADVISORY COMMITTEE STAFF REPORT Department of Finance & Administration

MEETING DATE: May 21, 2024
SUBJECT: Hilton Head Symphony Orchestra: 2024 Bluffton Concerts
PROJECT MANAGER: Shannon Milroy, Budget, Grants & Procurement Administrator

Summarized below is the application from the Hilton Head Symphony Orchestra for Accommodations Tax grant dollars in support of advertising and facilities for their 2024 Bluffton Concerts.

Total Budget: \$89,709

Requested Amount: \$43,632

Percentage of Request^: 48.64%

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

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Total Budget for Category	Recommended ATAX Funds
Advertising & Promotion of Tourism or Arts and Cultural Events	\$16,423	\$16,423
Facilities for Civic and Cultural Events	26,950	26,950
Public Facilities	259	259
Municipality and County Services	-	*
Tourist Transportation	-	*
Other/Ineligible Project Expenses	46,077	
Total	\$89,709	\$43,632

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

Budgeted Expenses:

Advertising & Promotion:

Total budget \$16,423

- Includes an advertising blitz, social media and news articles with interviews and photos throughout South Carolina as well as adjoining states media contacts.

Facilities for Civic and Cultural Events:

Total budget \$26,950

- Includes venue, tent, stage, HVAC, sound and lighting equipment rentals.

Public Facilities:

Total budget \$259

- Port-o-Lets rental; amount requested is prorated at the estimated tourist percentage.

Other/Ineligible Project Expenses:

Total budget \$46,077

- Guest artist and orchestra musician expenses, production labor and security, music library and general/administrative expenses

Table Rating (Scores 0-5 with 5 satisfying the qualifications best, exception Advertising 0-15)

Amount Recommended	Advertising (15)	Festival / Event (5)	Bluffton Event (5)	Tourism Draw % (5)	Benefit to Tourism (5)	Self-Sufficiency % (5)	Total of 40 possible	Comments
\$43,632	9	4	5	3	4	4	29	

Advertising: Of the requested funds, approximately 38% is related to advertising and promotion. Advertising is typically printed in the Bluffton Sun, Hilton Head Sun, Local Life Magazine and on Social Media, broadcast on WTOG and WHHI and South Carolina Radio, via email blasts and brochures and rack cards placed at the Savannah/Hilton Head Airport as well as Bluffton hotels and downtown businesses.

Festival/Event: The HHSO will perform two separate concerts in Bluffton; one in October during the Arts & Seafood Festival and one in November.

Bluffton Event: The October Outdoor Pops Concert will be held at Martin Family Park; in November, the Holiday Pops Concert will be held at the St. Gregory the Great Catholic Church Parish Life Center.

Tourism Draw %: HHSO collaborates with the Arts & Seafood Festival to hold the October concert during the 9-day event; 20% of the anticipated 1,100 attendees are tourists. The Holiday Pops Concert is held at a time when out-of-town guests are visiting and attend with family and friends who are local residents.

Benefit to Tourism: The October show enhances the Arts & Seafood Festival by offering a free show to attendees while the November performance provides an event for out-of-town guests, some of whom may stay in Bluffton hotels, that are here for the holiday season.

Self-Sufficiency % (Financial Need): The request is approximately 49% of HHSO's total projected events budget of \$89,709. Other sources of income include ticket sales, private support and additional public support.

Previous Funding Amounts						
Fiscal Year	Requested Amount	% of Budget	Advisory Committee Recommendation	Town Council Approved	Expended	Comments
2023	\$48,628	54%	\$48,628	\$48,628	\$40,496.85	2023 Bluffton Concerts
2022	\$38,374	45%	\$38,374	\$38,374	\$33,499	2022 Bluffton Concerts

Accommodations Tax Committee Recommendations and Comments:

The Committee recommends funding \$43,632 for advertising and promotion and facilities for civic and cultural events expenses.

Milroy, Shannon

From: noreply@civicplus.com
Sent: Saturday, March 30, 2024 6:48 AM
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	3/22/2024
Full Legal Organization Name	BlacQuity
Project Name	Roots & Rivers Festival
Total Project Costs	55,250
Total ATAX Funds Requested	25,000
Percent of Total Budget	40%
Address	4 Water Tupelo Lane

Street Address Line 2	PO BOX 3132
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.

[FinalLetter 88-0662577 BLACQUITYSC 02142022 00 \(1\) IRS Determination Letter.tif](#)

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

[Report Permit54649 638458478571304555.pdf](#)

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Organization Primary Point of Contact

First Name	Gwen
Last Name	Chambers
Title	executive director
Phone Number	8435406292
E-mail Address	gwen@blacquitysc.org

(Section Break)

Organization Secondary Point of Contact

First Name	<i>Field not completed.</i>
Last Name	<i>Field not completed.</i>
Title	<i>Field not completed.</i>
Phone Number	<i>Field not completed.</i>

E-mail Address

Field not completed.

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Project Description:

The Roots & Rivers Festival will host its second annual event hosted by BlacQuity, showcasing the rich cultural heritage of the Lowcountry region. This vibrant festival celebrates the music, art, food, artisans and traditions of the area, highlighting the contributions of black-owned businesses and artists.

The festival features live performances by local musicians, a marketplace showcasing products from black entrepreneurs, and a variety of food vendors offering traditional and contemporary dishes. Attendees can also participate in interactive workshops, cultural demonstrations, and community discussions focused on promoting diversity, equity, and inclusion.

The Roots & Rivers Festival is a family-friendly event that attracts visitors from across the region, offering a unique opportunity to experience the rich cultural tapestry of the Lowcountry. Through engaging artisans, programming and dynamic performances, the festival aims to foster a sense of community pride and celebrate the shared heritage of all residents.

Our advertising materials incorporate the Town of Bluffton's branding standards, including the use of the Town's logo in accordance with the design standards outlined by the Town.

We invite you to join us at the Roots & Rivers Festival as we celebrate the cultural diversity and artistic talent of the Lowcountry region. Together, we can create an inclusive and vibrant community that celebrates our shared heritage and promotes economic growth for all residents.

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 Roots & Rivers Festival can have a significant impact on tourism in the Town of Bluffton. By showcasing the vibrant culture, music, and cuisine of the region, the festival attracts

tourists who are interested in experiencing the unique offerings of the area. This influx of visitors not only boosts local businesses, such as hotels, restaurants, and shops, but also helps to promote Bluffton as a destination for cultural tourism. Additionally, the festival can help to enhance the town's reputation as a welcoming and inclusive community, which can attract repeat visitors and encourage positive word-of-mouth recommendations. Overall, the Roots & Rivers Festival has the potential to contribute to the growth and development of tourism in the Town of Bluffton.

Overall, the target audience for the BlacQuity Roots & River Festival is a diverse group of individuals who appreciate music, art, culture, and community. They seek meaningful experiences, connection with others, and the opportunity to celebrate and explore diverse aspects of life.

BlacQuity Roots & River Festival's focus on celebrating small businesses as the roots of the local economy. The BlacQuity Roots & River Festival is dedicated to showcasing and supporting small businesses, recognizing them as the foundational roots of our local economy. Our target audience consists of individuals who value and actively support small businesses. They are passionate about community development, economic empowerment, and the unique offerings that black small businesses bring to the table.

“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: 9/14/2024 - 9/15/2024

Multi-Year Project/Event? No

Permits Required, if any: alcohol

Additional Comments: Field not completed.

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

FINANCIAL INFORMATION

Project/Event Line Item Budget [Roots Rivers Budget 2024.pdf](#)

Most Recent Fiscal Year Balance Sheet and Profit and Loss Accounting Statement [Balance Sheet - ProfitLoss 2023 BQ.pdf](#)

Financial Guarantee [BlacQuity Board Meeting Minutes 3.28.24.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	Sponsor
Amount/Value	10000
Contribution	Sponsor
Amount/Value	5000

(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?	No
--	----

If yes, please list all sources and amounts:

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

PRIOR RECIPIENT'S REPORT

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

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

Has your organization previously received ATAX funds from the Town of Bluffton?	Yes
Project/Event Name	Roots & Rivers Festival
Year	2023
Amount Awarded	21,800
Was project completed?	Yes
How were the funds used?	Primarily used for marketing expenses. We also used funds to secure logistical necessities - staging, security, additional parking, shuttle services and additional restroom facilities on premise.
What impact did this project/event have on the community or benefit tourism? Describe how the tourism data was measured.	<p>The Roots & Rivers Festival of 2023 had a significant impact on the community and benefited tourism in several ways. The festival showcased the rich cultural heritage of the Lowcountry region, attracting visitors from near and far. The event featured live music, local cuisine, and a marketplace highlighting products from black-owned businesses.</p> <p>To measure the impact on tourism, data was collected through various methods, including:</p> <p>Attendance: The number of attendees at the festival was tracked to assess the event's popularity and its ability to draw visitors to the area.</p> <p>Media Coverage: The festival's media coverage, both locally and regionally, was assessed to determine its reach and influence in attracting tourists to the area.</p>

This being the first year, the Roots & Rivers Festival of 2023 had a positive impact on the community by celebrating its cultural heritage, supporting local businesses, and attracting tourists to the area, thereby benefiting the local economy and promoting tourism in the Town of Bluffton. We hope to increase our impact for this year.

(Section Break)

Please provide the project/event budgets for the previous two (2) years.

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	Gwendolyn Chambers
-----------	--------------------

Signatory's Title or Position	Executive Director
-------------------------------	--------------------

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



Department of the Treasury
Internal Revenue Service
Tax Exempt and Government Entities
P.O. Box 2508
Cincinnati, OH 45201

BLACQUITY SC
PO BOX 3132
BLUFFTON, SC 29910

Attac Section IX. Item #3.

Date:
03/09/2022
Employer ID number:
88-0662577
Person to contact:
Name: Customer Service
ID number: 31954
Telephone: 877-829-5500
Accounting period ending:
December 31
Public charity status:
170(b)(1)(A)(vi)
Form 990 / 990-EZ / 990-N required:
Yes
Effective date of exemption:
February 2, 2022
Contribution deductibility:
Yes
Addendum applies:
No
DLN:
26053447002412

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

Stephen A. Martin

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements

TOWN OF BLUFFTON

TOWN OF BLUFFTON - Expires:04/30/2025

License No.	24-03-0250	Business Name:	BlacQuity SC
	03/12/2024		
NAICS Title:	Other Similar Organizations (except Business, Professional, Labor, and Political	Business DBA Name:	BlacQuity SC
Business Type:	Economic Development Center	Physical Address:	4 WATER TUPELO LN 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.

Expenses		
Logistics		
	Dumpter (Dump & Haul)	\$500
	Orange fencing barricade	\$1,000
	Shuttle Services	\$1,200
	Rentals (Stage, Tents, etc.)	\$1,900
	Royal Restrooms	\$1,800
	Police/Security (town will use)	\$850
	Entertainment	\$7,500
	Admin fees (ticket sales, wristbands)	\$500
	Insurance, permits	\$500
	Venue Town of Bluffton	\$600
Marketing		
	Merchandise (tshirts, cinch bags, koozies)	\$7,000
	Print Paid Media	\$9,500
	Radio Paid Media	\$5,000
	Digital Paid Media	\$8,500
	Social Paid Marketing	\$2,500
	Influencer partnerships	\$3,000
	Print materials (banners, signs, posters, flyers)	\$5,000
	Design materials (banners, signs, posters, flyers)	\$2,000
	Public Relations	\$4,000
	Videography & Photography	\$1,500
	Photo Booth	\$1,500
	Photo Booth Backdrop Installations	\$1,300
Total Expenses		\$67,150

BlacQuity

Balance Sheet

As of December 31, 2023

Attac

Section IX. Item #3.

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
SMALL BUSINESS CHECKING (3861) - 4	87,832.28
zAdjustment	0.00
Total Bank Accounts	\$87,832.28
Other Current Assets	
Payments to deposit	0.00
Total Other Current Assets	\$0.00
Total Current Assets	\$87,832.28
TOTAL ASSETS	\$87,832.28
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	
Direct Deposit Payable	0.00
Payroll Liabilities	
Federal Taxes (941/944)	710.83
SC Income Tax	111.71
SC Unemployment Tax	288.40
Total Payroll Liabilities	1,110.94
Total Other Current Liabilities	\$1,110.94
Total Current Liabilities	\$1,110.94
Total Liabilities	\$1,110.94
Equity	
Retained Earnings	27,155.82
Net Revenue	59,565.52
Total Equity	\$86,721.34
TOTAL LIABILITIES AND EQUITY	\$87,832.28

BlacQuity

Statement of Activity January - December 2023

	TOTAL
Revenue	
Contributed income	
Donations	147,086.00
Roots & Rivers Festival - Sponsorship 250.00	250.00
Roots and Rivers Festival	35,825.00
Total Contributed income	183,161.00
Total Revenue	\$183,161.00
GROSS PROFIT	\$183,161.00
Expenditures	\$118,463.48
NET OPERATING REVENUE	\$64,697.52
Other Revenue	\$4,648.25
Other Expenditures	
Business Meeting	592.57
Business membership	75.00
Fundraising event - entertainment	2,300.00
Program - BEU Class	6,754.86
Vehicle expenses	57.82
Total Other Expenditures	\$9,780.25
NET OTHER REVENUE	\$ -5,132.00
NET REVENUE	\$59,565.52



BLACQUITY

MEETING MINUTES

DATE: MARCH 28 2024 - 4PM

Attendees

Board members present:

- | | |
|-------------------|------------------------|
| Billy Watterson | • Staff: Gwen Chambers |
| Derek Jenkins | • Staff: Natasha Aiken |
| Courtney O'Connor | • Staff: Sherri Todd |
| Chris Forster | |
| Carl Statham | |
| Scott Beebe | |
| Jacquelyn Brown | |
| Serena Miles | |

Minutes

Call to Order

- The meeting was called to order at 4:50 pm by Board President Billy Watterson.

Approval of Minutes

- The minutes from the February 29, 2024 meeting were approved.

Treasurer's Report

- Chris Forster presented the financial report. Serena Miles was appointed as the new Treasurer to replace Chris Forster.

Marketing Report

- Request board approval for a \$25,000 budget for the 2024 Roots & Rivers Festival marketing and operations. The board voted to approve the \$25,000 festival budget.

Executive Director's Report

- Gwen Chambers provided an update on the entrepreneurship program and her transitioning the new program coordinator into her role

New Business

- Chris Forster discussed an upcoming childcare facility and business incubator space opportunity in the town.

Adjournment

- The meeting was adjourned at 5:30 pm.

Agenda

1. Call to Order
2. Approval of Minutes
3. Treasurer's Report
4. Marketing Report
5. Development Report
6. Executive Director's Report
7. Committee Reports
 - Governance
 - Finance
 - Marketing
 - Strategic
8. New Business
9. Announcements
10. Adjournment

Action Items

- Submit the ATAX funding request for \$25,000 to the Town of Bluffton for the Roots & Rivers Festival marketing and operations due March 31st
- Recruit a new Board member with small business development experience.
- Send the details of the RFP for a new childcare facility to the entrepreneur interested in applying
- Fill the 2 open Board seats and send recommendations to the Governance committee
- Set up check-ins with the new program coordinator as part of the onboarding process.

Final Announcements

- April 29th - Entrepreneur Denice Brown - Hair By Denice/ Grand Opening 10am HHI 19 Dunnagan Alley
- April 4th 5:30pm Island Rec Center - Town of HHI Small & Minority Business Service Information - BlacQuity would have an information table
- Roots & Rivers Festival on September 14th
- Birdies for Charity golf tournament fundraiser where BlacQuity could receive a 20% increase for each donations.

ACCOMMODATIONS TAX ADVISORY COMMITTEE

STAFF REPORT

Department of Finance & Administration



MEETING DATE: May 21, 2024
 SUBJECT: BlacQuity SC: 2024 Roots and Rivers Festival
 PROJECT MANAGER: Shannon Milroy, Budget, Grants & Procurement Administrator

Summarized below is the application from BlacQuity SC for Accommodations Tax grant dollars in support of advertising, facilities, security and transportation for their 2024 Roots and Rivers Festival.

Total Budget: \$67,150

Requested Amount: \$25,000

Percentage of Request^: 37.23%

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

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Total Budget for Category		Recommended ATAX Funds
Advertising & Promotion of Tourism or Arts and Cultural Events	\$42,500		\$25,000
Facilities for Civic and Cultural Events	3,000		
Public Facilities	1,800	*	
Municipality and County Services	850	*	
Tourist Transportation	1,200	*	
Other/Ineligible Project Expenses	17,800		
Total	\$67,150		\$25,000

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

Budgeted Expenses:

Advertising & Promotion:

Total budget \$42,500

- Includes print, radio, and digital advertising as well as social media, banners, signs, posters and flyers

Facilities for Civic and Cultural Events:

Total budget \$3,000

- Includes rentals of venue, stage, tents and dumpster

Public Facilities:

Total budget \$1,800

- Port-o-Lets rental

Municipal and County Services:

Total budget \$850

- Bluffton Police Department security

Tourist Transportation:

Total budget \$1,200

- Shuttle services for attendees

Other/Ineligible Project Expenses:

Total budget \$17,800

- Entertainment, administrative costs, insurance, permits, videography and photography

Table Rating (Scores 0-5 with 5 satisfying the qualifications best, exception Advertising 0-15)

Amount Recommended	Advertising (15)	Festival / Event (5)	Bluffton Event (5)	Tourism Draw % (5)	Benefit to Tourism (5)	Self-Sufficiency % (5)	Total of 40 possible	Comments
\$25,000	10	4	4	3	3	4	28	

Advertising: Of the requested funds, all \$25,000 could be spent on advertising, but the application does not make it clear if that is the intention; the specific media vehicles that will be used is not defined.

Festival/Event: The event is a one-day festival featuring food and entertainment.

Bluffton Event: The location of the 2024 event was not identified in the application; in 2023, the event was held at Oyster Factory Park.

Tourism Draw %: In 2023, the inaugural event, the estimated tourism attendance was 49%.

Benefit to Tourism: The influx of visitors boosts local businesses and promotes Bluffton as a destination for cultural tourism.

Self-Sufficiency % (Financial Need): The request is approximately 37% of BlacQuity's total projected events budget of \$67,150 for 2024. A revenue budget was not included with the application to identify other sources of income for the event.

Previous Funding Amounts						
Fiscal Year	Requested Amount	% of Budget	Advisory Committee Recommendation	Town Council Approved	Expended	Comments
2024	\$38,186	57%	\$21,836	\$21,836	\$0.00	Amounts consist of both grant awards combined. Final report submitted; working on final reimbursement request/amount

Accommodations Tax Committee Recommendations and Comments:

The Committee recommends funding \$25,000 for eligible expenses.

Milroy, Shannon

From: noreply@civicplus.com
Sent: Sunday, March 31, 2024 3:42 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	3/30/2024
Full Legal Organization Name	The Bluffton MLK Observance Committee
Project Name	9th Annual Bluffton Juneteenth Festival Weekend
Total Project Costs	48,500
Total ATAX Funds Requested	20,000
Percent of Total Budget	42
Address	PO BOX 1158

Street Address Line 2 *Field not completed.*

City BLUFFTON

State South Carolina

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. [IRS Exempt.jpg](#)

Please upload a copy of your current Town of Bluffton Business License, which is required of all applicants. [IRS Exempt 1.jpg](#)

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Organization Primary Point of Contact

First Name Jacquelyn

Last Name Brown

Title Festival Chair/Board Member

Phone Number 8432270485

E-mail Address blufftonmlk@yahoo.com

(Section Break)

Organization Secondary Point of Contact

First Name Benisha

Last Name Brown

Title Treasurer

Phone Number 8434942408

E-mail Address blufftonmlk@yahoo.com

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Project Description: The Bluffton Juneteenth Festival is a weekend celebration that recognizes the national abolishment of all enslaved Africans in the United States. Juneteenth has become a nationally recognized holiday that honors the abolishment of slavery and highlights the liberation of the enslaved who through the greatest of adversities triumph and impacted the fabric of America greatly.

The Bluffton community will celebrate a tradition commemorating the emancipation of enslaved Africans in America during the annual Bluffton Juneteenth Festival, June 14– 16. The goal of this three-day event is to educate and honor the strength and prosperity surrounding the Black experience. This is a community event for all noting that all history is American History.

The Bluffton Juneteenth Festival will kick-off with the 3rd Annual Black Food Truck Friday Festival Event Friday, June 14, 5 – 10 p.m. at Buckwalter Commerce Park, 25 Buckwalter Place Blvd. This event will host an array of Black-owned food trucks and vendors, featuring menus ranging from Gullah inspired to Caribbean flared. While there, guests will be thrilled by live entertainment from Smooth -N- Groove, The Soulmate and a dj. There will be a dedicated Kids Zone play area with games, water slides and bouncee houses. This family-inclusive event is free and open to the public.

The fun resumes on Saturday, with the 9th Annual Bluffton Juneteenth Festival, June 15 at the Burnt Church Distillery, 120 Bluffton Rd., 4 – 10 p.m. with live entertainment, performing artists, food and artisan vendors, a kid’s zone, drum circle, and much more! This free event will feature the Sea Ports hottest DJ; CJ the DJ, in addition to performances by John Simmons, Energy Evolution, MAJ Drum Circle, gospel shout hour, Gullah/Africana Historian Dr. Toure, along with readings by Town Council Member Fred Hamilton and other elected officials. Shuttles will be provided to and from this event beginning at 3:30 p.m. from Red Cedar Elementary School, 10 Box Elder St., where ample, free parking is available. Personal lawn chairs are welcomed and encouraged.

The series of events will conclude on Sunday, June 16 at Burnt Church Distillery with the 4th annual Jazz Brunch, 11 a.m. – 2

p.m. This ticketed event will include a catered buffet from Melly Mel's, along with mimosa and dessert bars.

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:

8th Annual Bluffton Juneteenth Festival was a 3-day weekend full of events that attracted tourists from other states, countries and drew a crowd over 3 days of 5,000+ and brought in thousands in revenue to the town of Bluffton as visitors stayed in the area to enjoy the entire weekend, and also patronized other restaurants and stores during their stay.. Friday June 16th was the 2nd Black Food Truck Friday Festival event that showcased eight food trucks and eight non-food truck vendors. The crowd count that day averaged an attendance count of 1,000+ with 70% being tourists. Saturday June 17th was the 8th annual Juneteenth Festival that showcased art, entertainment, culture, food, history, etc. The crowd count throughout the day was over 5,000 attendees with over 70% being tourists. Sunday June 18th was the 3rd Annual Juneteenth Father's Day Brunch. The event was capped at 150 guests, with over 50% being tourists. Areas they traveled from included Savannah, Hilton Head, Beaufort, Jacksonville, Charleston, Charlotte, Brunswick, Columbia, Atlanta, Panama City, Baltimore, West Palm Beach, Tulsa, Los Angeles, New York and many other places.

***"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: 6/14/2024 - 6/16/2024

Multi-Year Project/Event?

No

Permits Required, if any:

Special Events Permit, ABL

Additional Comments:

Field not completed.

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

FINANCIAL INFORMATION

Project/Event Line Item Budget

[Juneteenth Budget 2024.xlsx - Juneteenth Events.pdf](#)

Most Recent Fiscal Year Balance Sheet and Profit and Loss Accounting Statement

[MLK 2023 Financial Statement - Sheet1.pdf](#)

Financial Guarantee

[MLK Meeting Minutes January 2024 Minutes.docx.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

Burnt Church Distillery (1/2 in kind)

Amount/Value

20,000

Contribution

Bluffton MLK Observance Committee

Amount/Value

10,000

(Section Break)

Have you requested, received or been awarded funding from

Yes

other sources or organizations (including additional ATAX funds from other local entities) for this project/event?

If yes, please list all sources and amounts:

Funding Source	Mikkelson Law Firm
----------------	--------------------

Amount	500.00
--------	--------

Funding Source	Ward Edwards Engineering
----------------	--------------------------

Amount	500.00
--------	--------

Funding Source	South Atlantic Bank
----------------	---------------------

Amount	2,500.00
--------	----------

Funding Source	Shoreline Construction
----------------	------------------------

Amount	500.00
--------	--------

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	Bluffton Juneteenth Festival Weekend
--------------------	--------------------------------------

Year	2023
------	------

Amount Awarded	20,000
----------------	--------

Was project completed?	Yes
------------------------	-----

How were the funds used?	Funds were used to have shuttle services for guests, restroom rental, stage rental equipment, tent and chair rental, marketing for print, radio and digital ads, festival banner, flyers.
--------------------------	---

What impact did this project/event have on the community or benefit tourism? Describe how the tourism data was measured.	The event brought great recognition to the town drawing in tourists from neighboring cities, states and the country. Visitors stayed in with our lodging partners, and brought additional traffic and revenue to area businesses. Tourism data was measured by capturing zip codes through online ticket purchases, by having guests complete a survey through a qr code scan and also with the help of USCB who attended the festival Friday and Saturday and greeted guests and surveyed them to capture data.
--	--

(Section Break)

Please provide the project/event budgets for the previous two (2) years.	Juneteenth Budget -2022.xlsx - Saturday Event.pdf
--	---

Additional Comments	<i>Field not completed.</i>
---------------------	-----------------------------

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 Jacquelyn Brown

Signatory's Title or Position Festival Chair

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

BLUFFTON MLK OBSERVANCE COMMITTEE
C/O BRIDGETTE FRAZIER
PO BOX 3737
BLUFFTON, SC 29910-0000

Date:
03/02/2021
Employer ID number:
85-4095993
Person to contact:
Name: Customer Service
ID number: 31954
Telephone: (877) 829-5500
Accounting period ending:
December 31
Public charity status:
170(b)(1)(A)(vi)
Form 990 / 990-EZ / 990-N required:
Yes
Effective date of exemption:
November 4, 2020
Contribution deductibility:
Yes
Addendum applies:
No
DLN:
26053738003050

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

Stephen A. Martin

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements

Income		
	Account	2024 Budget
	Burnt Church Distillery (in-kind)	(\$10,000)
	Burnt Church Distillery (sponsorship)	\$20,000
	Cash Sponsorships*	
	Juneteenth Brunch Ticket Sales	
	Town of Bluffton*	
	ATAF Funds*	
	Total Receivables	\$10,000
	<i>*Requested</i>	
Expenses		
Logistics		
	Venue	*10000
	Rentals (Stage, Production, Tents, Chairs, etc.)	\$8,000
	Sanitation	\$2,500
	Police/Security	\$5,000
	Shuttles/Trolleys	\$3,000
	Brunch Catering	\$3,500
	Bouncee House/Kids Play Rentals	\$2,500
	Entertainment	\$7,500
	Misc fees (Insurance, permits, printing, catering, dec	\$1,000
Marketing		
	Design & Promo (website, banners, signs, posters, flyers)	\$2,500
	Event Photography/Videography	\$3,000
	Print, Radio, and Digital Ads/Marketing	\$10,000
Total Expenses		\$48,500

2023 Financial Statement					
INDIVIDUAL CONTRIBUTIONS				Total	
	Grants	\$31,870			
	Net Assets	\$3,380			
	Donations	\$7,500			
	Total Support & Revenue	\$42,750			
EVENTS/FUNDRAISERS		EXPENSE	REVENUE		
	Gullah Market	\$0	\$0		
	Black Excellence Ball	\$4,000	\$3,000		
	Juneteenth	\$38,000	\$34,370		
	MLK Weekend Celebration	\$250	\$300		
	A Night In Harlem	\$500	\$750		
	Total Expense & Revenue	\$42,750	\$38,420		
PROGRAMS					
		EXPENSE	REVENUE		
	HBCU Atlanta College Tour	\$9,800	\$13,000		
	Senior Citizen Meal Progam	\$600	\$0		
	MLK Soup Kitchen	\$250	0		
EXPENSE	Personnel	\$0			
	Program Related Materials	\$0			
	Marketing	\$500			
Change In Net Assets		\$53,400	\$51,420	\$1,400	Balance Forward



MLK Meeting Minutes

1/23/24 Meeting commenced at 6:00pm

Present: Jacquelyn Brown, Benisha Brown, Aaron Jenkins, & Bridgette Frazier

Motion to adopt the agenda was made by Aaron Jenkins and second by Benisha Brown, vote was placed on the floor and unanimous consensus to approve the agenda was recorded.

Motion to approve the minutes from December's meeting was made by Benisha Brown and second by Aaron Jenkins, vote was placed on the floor and unanimous consensus to approve the agenda was recorded.

Old Business

- I. 2023 MLK Weekend Celebration
 - a. The Black Excellence Ball was a huge success, takeaways for 2024 BEB will be to change the award presentation to a brunch and have the Ball a fundraiser event solely focused on entertainment, fundraising, and food. Venue will be changed to remain in Bluffton.
 - b. Memorial Celebration/Peace Walk/Community Picnic
 - i. Another successful event. Monday youth participants did a phenomenal job. Bluffton JROTC were great parade marshals and showed out in great attendance. Participation and the community picnic wasn't as well attended as previous years; weather conditions could have been a factor. 2024 will be a focus on returning to partnering with local restaurants and caterers to donate food to offer hot lunches to the community.

New Business

1. Bluffton Gullah Market

- a. Gullah Markets will resume in April, and venue will continue to be at Martin Family Park with the exception of Juneteenth & Geechella,
- b. An effort to add more variety to the market will focus on a stronger presence of Black farmers, and artisans.

2. Juneteenth

- a. An ATAC application will be submitted to the Town by the March 31st deadline. The application request will be made to procure funds needed to advertise regionally and nationally in various mediums, funds will also help cover costs of shuttles, restrooms, security and stage needs.
- b. Sponsorship package for community partners and corporate sponsors will be ready to disseminate by the month's end and Bridgette will chair sponsorship.

- i. Burnt Church Distillery has confirmed an in-kind donation already for use of the venue for both Saturday and Sunday's event.
- ii. A meeting will be had with Lyndee from the town of Bluffton to confirm collaboration to host and sponsor the kids zone for Friday's event.
 1. Bluffton MLK Observance Committee along with additional sponsors who come on board will cover all remaining costs for the event to ensure its complete success.
- c. Entertainment has been confirmed; True Nu Sound will headline Friday's event, CJ The DJ will headline Saturday's event and The ZD Experience will headline Sunday's event. Lineup for the remainder of the weekend will be confirmed later.

The meeting was adjourned at 7:40pm

Income		
	Account	2022 Budget
	Cash Sponsorships*	\$7,500
	Town of Bluffton	\$500
	ATAX Funds*	*
	Total Receivables	\$8,000
	<i>*Requested</i>	
Expenses		
Logistics		
	Venue	\$10,000
	Rentals (Stage, Production, Tents, etc.)	\$5,395
	Sanitation	\$1,379
	Police/Security	\$3,000
	Shuttles/Trolleys	\$3,450
	Entertainment	\$5,100
	Misc fees (Insurance, permits, printing)	\$2,267
Marketing		
	Design & Promo (website, banners, signs, posters, flyers)	\$5,351
	Event Photography	\$600
	Print and Web Media Ads	\$10,555
Total Expenses		\$47,097

ACCOMMODATIONS TAX ADVISORY COMMITTEE

STAFF REPORT

Department of Finance & Administration



MEETING DATE: May 21, 2024
 SUBJECT: The Bluffton MLK Observance Committee: 9th Annual Bluffton Juneteenth Festival Weekend
 PROJECT MANAGER: Shannon Milroy, Budget, Grants & Procurement Administrator

Summarized below is the application from the Bluffton MLK Observance Committee for Accommodations Tax grant dollars in support of advertising, facilities, security and tourist transportation for the 9th Annual Bluffton Juneteenth Festival Weekend.

Total Budget: \$58,500

Requested Amount: \$20,000

Percentage of Request^: 42%

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

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Total Budget for Category		Recommended ATAF Funds
Advertising & Promotion of Tourism or Arts and Cultural Events	\$15,500		\$15,500
Facilities for Civic and Cultural Events	18,000		2,190
Public Facilities	2,500	*	1,050
Municipality and County Services	5,000	*	
Tourist Transportation	3,000	*	1,260
Other/Ineligible Project Expenses	14,500		
Total	\$58,500		\$20,000

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

Budgeted Expenses:

Advertising & Promotion:

Total budget \$15,500

- Includes design of ads, banners, signs, posters and fliers, cost of print, radio and digital ads and event photography/videography.

Facilities for Civic and Cultural Events:

Total budget \$18,000

- Includes venue, tent, stage, chairs and production rentals; cost of venue rental (\$10,000) will be donated as an in-kind service.

Public Facilities:

Total budget \$2,500

- Sanitation expense

Municipality and County Services:

Total budget \$5,000

- For Police/Security

Tourist Transportation:

Total budget \$3,000

- For Shuttles/Trolleys

Other/Ineligible Project Expenses:

Total budget \$14,500

- Expenses related to catering, entertainment and miscellaneous fees (insurance, permits, printing, etc.)

Table Rating (Scores 0-5 with 5 satisfying the qualifications best, exception Advertising 0-15)

Amount Recommended	Advertising (15)	Festival / Event (5)	Bluffton Event (5)	Tourism Draw % (5)	Benefit to Tourism (5)	Self-Sufficiency % (5)	Total of 40 possible	Comments
\$20,000	10	4	5	4	4	3	30	

Advertising: Of the requested funds, approximately 78% is related to advertising and promotion. Specifics regarding where print advertising would run or be broadcast were not included in the application.

Festival/Event: The annual Bluffton Juneteenth Festival Weekend spans three days; Black Food Truck Friday on June 14, the Bluffton Juneteenth Festival on June 15 and the Jazz Brunch on June 16.

Bluffton Event: The Black Food Truck Friday event will be held at Buckwalter Commerce Park and the Juneteenth Festival and Jazz Brunch will be hosted at Burnt Church Distillery.

Tourism Draw %: In 2023, both the Black Food Truck Friday and Juneteenth Festival events averaged a 70% tourist rate. The Sunday Brunch, which was capped at 150 tickets, saw a tourist rate at over 50%. Attendees came from Savannah, Beaufort, Jacksonville, Charleston, Charlotte, Atlanta, Panama City, Baltimore, Tulsa, Los Angeles, and New York, amongst others.

Benefit to Tourism: Because this festival spans a weekend, local hotels are booked while Bluffton shops and restaurants are patroned resulting in increased revenues across the town.

Self-Sufficiency % (Financial Need): The request is approximately 42% of the total projected festival budget of \$58,500. Other sources of income include in-kind donations, private support, cash sponsorships and Jazz Brunch ticket sales.

Previous Funding Amounts						
Fiscal Year	Requested Amount	% of Budget	Advisory Committee Recommendation	Town Council Approved	Expended	Comments
2023	\$20,000	40%	\$20,000	\$20,000	\$13,71.26	Final Report Submitted; Final Reimbursement Request Received/Paid
2022	\$28,400	60%	\$21,774	\$21,774	\$16,881.30	
2021	\$27,500	50%	\$27,500	\$27,500	\$20,396	

Accommodations Tax Committee Recommendations and Comments:

The Committee recommends funding \$20,000 for advertising and promotion, facilities for civic and cultural events, public facilities, and tourist transportation expenses.

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

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	3/30/2024
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

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

Attach

Section IX. Item #3.

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

**Internal Revenue Service
District Director**

Department of the Treasury

Date: **DEC 15 1983**

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

**Our Letter Dated:
February 24, 1982
Person to Contact:
William Anderson/jdf
Contact Telephone Number:
(404) 221-4516
Employer Identification Number:
57-0724129
File Folder Number:
580015849**

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

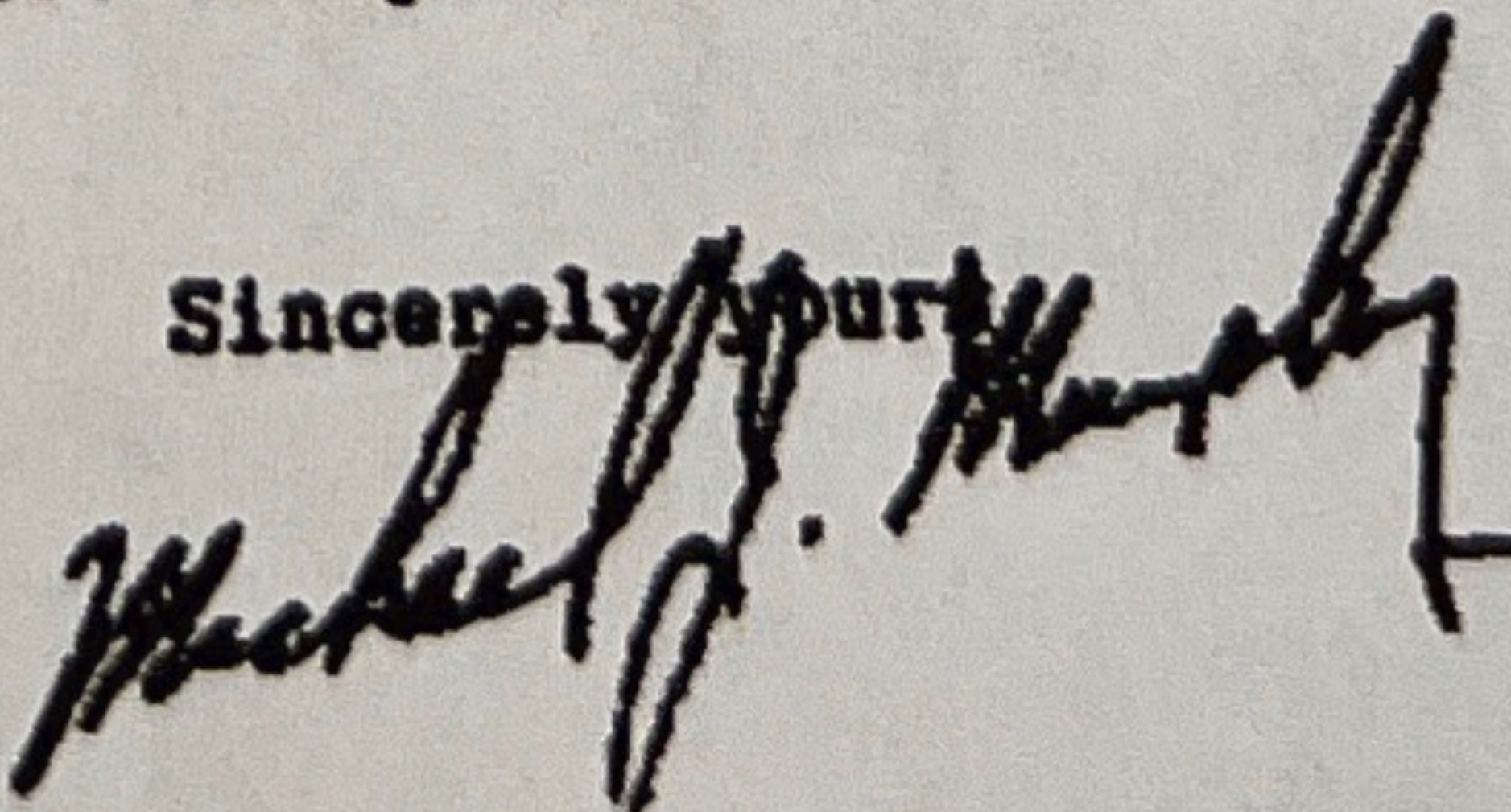
Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Internal Revenue Code, because you are an organization of the type described in section _____. Your exempt status under section 501(c)(3) of the code is still in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

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

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

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

Sincerely yours,



District Director

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

TOWN OF BLUFFTON

September 25, 2023

DATE ISSUED

April 30, 2024

EXPIRES

LIC-09-23-052115

LICENSE NUMBER

8499

BUSINESS ID

Bluffton Historic Preservation Society, Inc.

COMPANY NAME

Heyward House Museum and Welcome Center

DBA NAME

Non Profit - Museums

BUSINESS TYPE

BLUFFTON WELCOME CENTER

DESCRIPTION/CONDITIONS

70 BOUNDARY ST
BLUFFTON SC 29910-

BUSINESS LOCATION

PO Box 742

Bluffton SC 29910-

MAILING LOCATION

Attach

Section IX. Item #3.

Historic Bluffton Foundation						Attachment
Operational Budget						
Fiscal Year 2024-25						
				2024-25 Budget		
					Welcome	
					Center	HBF
				Total	Only	Only
				Budget	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

Section IX. Item #3.

Please see Page 2

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	
Restrict Grant Parks Tourism	500,000.00
Interest Income, PTR Grant	6,441.19
Specified Donation Account	5,128.75
Rental Income - Teel House	17,600.00
Archives	265.00
Donations	34,363.51
Gift Shop Income	10,457.65
Grant Income Private Foundation	52,075.00
ATAx Town of Bluffton	158,543.75
Interest Income, MM Account	1,259.25
Membership	3,100.00
Rental Income	8,087.50
Special Events	16,606.14
Tours/Program Income	16,800.10
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

	Jul '22 - Jun 23
Net Other Income	-2,081.64
Net Income	556,813.85



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

Get [Outlook for Android](#)

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

Approved 2020-2021 Budget			
	Welcome		
	Total	Center	BHPS
	Budget	Only	Only
	Budget	Budget	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	-	-	-

ACCOMMODATIONS TAX ADVISORY COMMITTEE

STAFF REPORT

Department of Finance & Administration



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

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

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

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

Percentage of Request^: 46.74%

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

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

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

Budgeted Expenses:

Advertising & Promotion:

Total budget \$7,800

- Includes advertising as well as their web site.

Facilities for Civic and Cultural Events:

Total budget \$124,300

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

Visitors Center Expenses:

Total budget \$207,200

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

Other/Ineligible Project Expenses:

Total budget \$3,000

- Bank Fees

Table Rating (Scores 0-5 with 5 satisfying the qualifications best, exception Advertising 0-15)

Amount Recommended	Advertising (15)	Tourism Draw % (5)	Benefit to Tourism (5)	Self-Sufficiency % (5)	Misc. (10)	Total of 40 possible	Comments
\$40,000	9	5	5	4	9	32	

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

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

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

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

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

Accommodations Tax Committee Recommendations and Comments:

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

Milroy, Shannon

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

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	4/1/2024
Full Legal Organization Name	Historic Bluffton Foundation
Project Name	Luke Peeples Music Celebration
Total Project Costs	13200
Total ATAX Funds Requested	5000
Percent of Total Budget	37%
Address	70 Boundary St.

Street Address Line 2 PO Box 742

City Bluffton

State SC

Zip Code 29910

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

Please upload a copy of your current Town of Bluffton Business License, which is required of all applicants. [2024-03-26_business-license-HHC.pdf](#)

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Organization Primary Point of Contact

First Name Robert

Last Name Jones Jr

Title Executive Director

Phone Number 8437576293

E-mail Address robert@historicbluffton.org

(Section Break)

Organization Secondary Point of Contact

First Name Jen

Last Name Sommerville

Title President

Phone Number 7602777716

E-mail Address Jen@dhabney.com

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

Project Description: Luke Peeples Music Revival Concert:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

“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: 10/25/2024 - 10/26/2024

Multi-Year Project/Event? No

Permits Required, if any: None

Additional Comments: *Field not completed.*

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

FINANCIAL INFORMATION

Project/Event Line Item Budget [2024-03-31-budget-Luke-Peebles-celebration.pdf](#)

Most Recent Fiscal Year Balance Sheet and Profit and Loss Accounting Statement [Historic Bluffton Foundation June 2023 Profit and Loss Report.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	Sponsor donations
Amount/Value	5500
Contribution	Ticket sales
Amount/Value	2000

(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?	No
--	----

If yes, please list all sources and amounts:

TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

PRIOR RECIPIENT'S REPORT

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

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

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

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

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

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

(Section Break)

Please provide the project/event budgets

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

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**

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

**Our Letter Dated:
February 24, 1982
Person to Contact:
William Anderson/jdf
Contact Telephone Number:
(404) 221-4516
Employer Identification Number:
57-0724129
File Folder Number:
580015849**

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

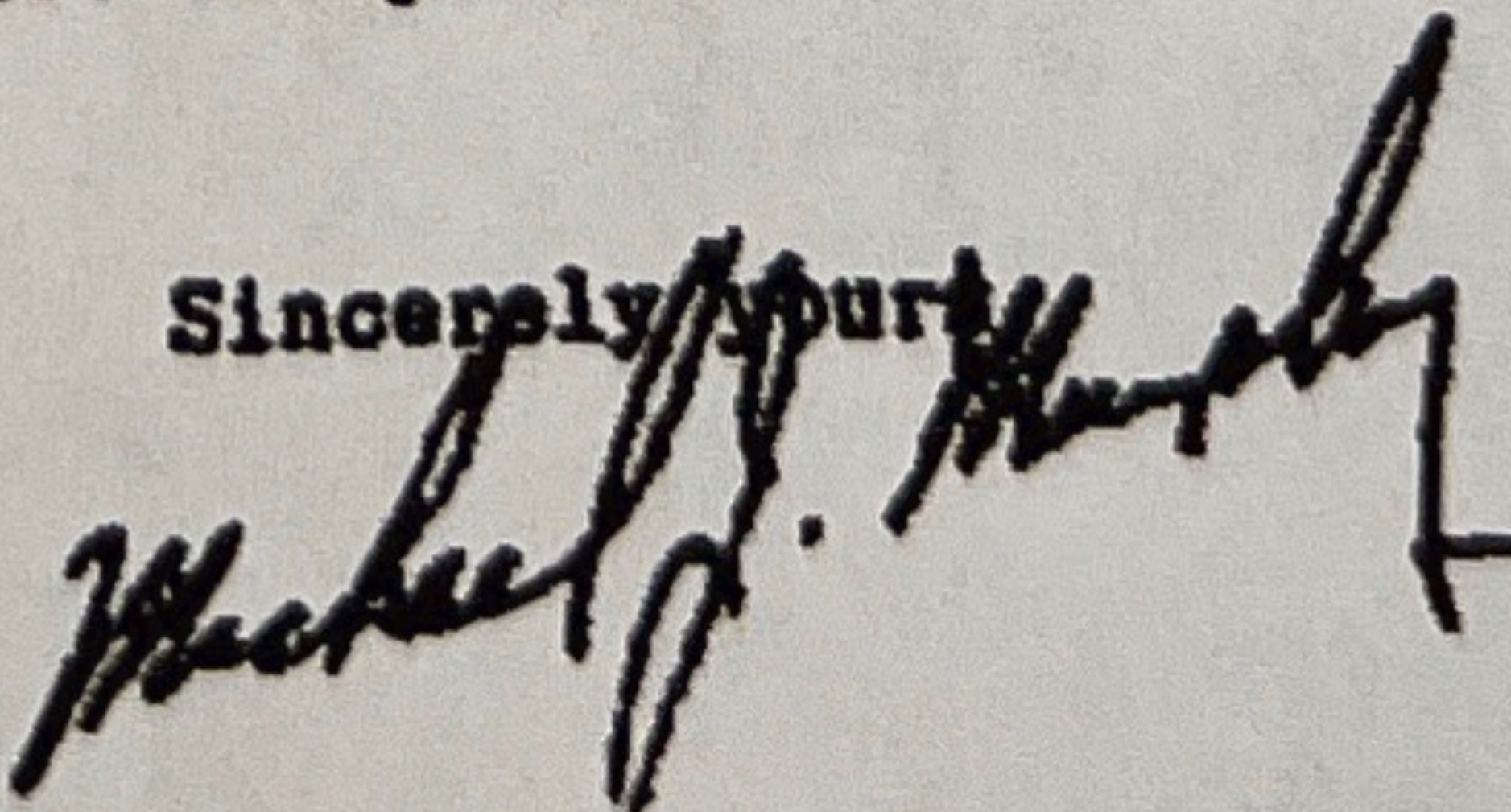
Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Internal Revenue Code, because you are an organization of the type described in section _____. Your exempt status under section 501(c)(3) of the code is still in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

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

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

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

Sincerely yours,



District Director

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

TOWN OF BLUFFTON

September 25, 2023

DATE ISSUED

April 30, 2024

EXPIRES

LIC-09-23-052115

LICENSE NUMBER

8499

BUSINESS ID

Bluffton Historic Preservation Society, Inc.

COMPANY NAME

Heyward House Museum and Welcome Center

DBA NAME

Non Profit - Museums

BUSINESS TYPE

BLUFFTON WELCOME CENTER

DESCRIPTION/CONDITIONS

70 BOUNDARY ST
BLUFFTON SC 29910-

BUSINESS LOCATION

PO Box 742

Bluffton SC 29910-

MAILING LOCATION

Attach

Section IX. Item #3.

HBF Celebration of the Music of Luke Peeples

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

Historic Bluffton Foundation, Inc.

Profit & Loss

Accrual Basis

July 2022 through June 2023

	Jul '22 - Jun 23
Ordinary Income/Expense	
Income	
Restrict Grant Parks Tourism	500,000.00
Interest Income, PTR Grant	6,441.19
Specified Donation Account	5,128.75
Rental Income - Teel House	17,600.00
Archives	265.00
Donations	34,363.51
Gift Shop Income	10,457.65
Grant Income Private Foundation	52,075.00
ATAx Town of Bluffton	158,543.75
Interest Income, MM Account	1,259.25
Membership	3,100.00
Rental Income	8,087.50
Special Events	16,606.14
Tours/Program Income	16,800.10
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

	Jul '22 - Jun 23
Net Other Income	-2,081.64
Net Income	556,813.85



Robert Jones <robert@historicbluffton.org>

Luke Peeple's event budget

Jen Sommerville <jen@dhabney.com>

Mon, Apr 1 at 4:37 PM

To: Robert Jones <robert@historicbluffton.org>

Robert,

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

Thank you,

Jen Sommerville
Board Chair

Get [Outlook for Android](#)

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

Attach



ACCOMMODATIONS TAX ADVISORY COMMITTEE STAFF REPORT Department of Finance & Administration

MEETING DATE: May 21, 2024
SUBJECT: Historic Bluffton Foundation: Luke Peeples Music Celebration
PROJECT MANAGER: Shannon Milroy, Budget, Grants & Procurement Administrator

Summarized below is the application from the Historic Bluffton Foundation for Accommodations Tax grant dollars to support marketing and facilities costs for the Luke Peeples Music Celebration.

Total Budget: \$13,200

Requested Amount: \$5,000

Percentage of Request^: 37%

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

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Total Budget for Category		Recommended ATAX Funds
Advertising & Promotion of Tourism or Arts and Cultural Events	\$2,000		
Facilities for Civic and Cultural Events	1,200		
Public Facilities			
Municipality and County Services		*	
Tourist Transportation		*	
Other/Ineligible Project Expenses	10,000		
Total	\$13,200		Tabled

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

Budgeted Expenses:

Advertising & Promotion:

Total budget \$2,000

- Includes poster design and printing, invitation postcards and keepsake programs

Facilities for Civic and Cultural Events:

Total budget \$1,200

- Audio-Visual Support

Other/Ineligible Project Expenses:

Total budget \$10,000

- Entertainment, artist accommodations, printed music and corsages for singers, reception costs and miscellaneous expenses

Table Rating (Scores 0-5 with 5 satisfying the qualifications best, exception Advertising 0-15)

Amount Requested	Advertising (15)	Festival / Event (5)	Bluffton Event (5)	Tourism Draw % (5)	Benefit to Tourism (5)	Self- Sufficiency % (5)	Total of 40 possible	Comments
\$5,000								Tabled

Advertising: Of the requested funds, 40% is anticipated to be spent on marketing the event. Where advertising will take place is not identified in the application.

Festival/Event: The concert will be held on one day towards the end of October with a reception to follow the same day.

Bluffton Event: The venue for the concert is unclear in the application, but a post-show reception will be held at the Heyward House.

Tourism Draw %: This is an inaugural event and therefore, no tourism statistics exist.

Benefit to Tourism: The concert has the potential to impact local businesses by attracting visitors to an event that contributes to Bluffton's unique cultural heritage.

Self-Sufficiency % (Financial Need): The request is approximately 37% of the Historic Bluffton Foundation's projected event budget. Other revenue sources include sponsorships, donations (cash and in-kind) and sales of tickets and posters.

Previous Funding Amounts						
Fiscal Year	Requested Amount	% of Budget	Advisory Committee Recommendation	Town Council Approved	Expended	Comments
n/a						

Accommodations Tax Committee Recommendations and Comments:

The Committee recommends tabling the application and reapplying for quarter ending June 30, 2024.

Table Rating Matrix-----COMMITTEE AVERAGE POINTS-----

Points
Awarded

Advertising possible total points - 15

Part 1 - 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 points
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 - 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 (examples Island Packet, Bluffton Today)	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 (example Charleston or Savannah newspapers)	6 points
Newspapers/periodicals/electronic marketing to large, metropolitan areas outside of 100 miles away (example Atlanta Journal/Constitution, Charlotte newspaper, Washington Post ,Chicago Tribune)	8 points
Nationally distributed newspapers/periodicals/electronic marketing (example, USA Today, New York Times, Time Magazine, Southern Living, airline in-flight magazines)	10 points

Festival/Event possible total points - 5

- higher point value given to requests for festivals or events
- length of event or festival should be considered. Is it an all-day event versus a two-hour event?
- higher point value could be awarded for multi-day festivals

Bluffton Event possible total points - 5

- higher point value given to events held within the town limits of Bluffton
- higher point value given to events spanning multiple locations?

Tourism Draw possible total points - 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 points
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 (economy) possible total points - 5

- higher point value given to events that encourage overnight stays
- higher point value given to events that have local business participation

Self Sufficiency possible total points - 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 possible total points – 10 (Only use if applicant does not qualify as a festival/event)

Group Average Grand Point Total out of a possible 40 points

Group Average % (out of 40 points)

Grant Requests	Amount Requested	Advisory Committee Recommendation	Town Council Approved	Paid FY 2022	Paid FY 2023	LAPSED FY 2023	Paid FY 2024	LAPSED FY 2024	Remaining
Applications Received December 30, 2021									
May River Theatre, Inc.: Advertising for 2022 Season	\$ 22,195	\$ 21,217	\$ 21,217	\$ -	\$ 6,262	\$ -	\$ -	\$ 14,954	\$ -
Old Town Bluffton Merchants Society: Marketing	16,000	16,000	16,000	7,322	3,516	-	-	5,162	-
Town of Bluffton - Squire Pope Cottage	215,000	215,000	215,000	-	215,000	-	-	-	-
Total Grants for 2nd Quarter Payments	\$ 253,195	\$ 252,217	\$ 252,217	\$ 7,322	\$ 224,778	\$ -	\$ -	\$ 20,117	\$ -
Applications Received March 31, 2022									
Bluffton MLK Observance Committee: Juneteenth 2022	\$ 28,400	\$ 21,774	\$ 21,774	\$ -	\$ 16,881	\$ -	\$ -	\$ 4,893	\$ -
Boys & Girls Club of the Lowcountry: Bike Bluffton	10,000	10,000	10,000	-	5,000	5,000	-	-	-
Bluffton Gullah Heritage Center	60,000	-	60,000	-	-	-	-	-	60,000
Hilton Head Symphony Orchestra: 2022 Bluffton Concerts	38,374	38,374	38,374	-	33,499	-	-	4,875	-
Historic Bluffton Foundation: Heyward House Welcome Center	175,000	175,000	175,000	-	89,432	-	68,865	-	16,702
Society of Bluffton Artists: Promoting Arts in the Lowcountry	16,063	16,063	16,063	2,076	10,183	-	-	3,804	-
Total Grants for 3rd Quarter Payments	\$ 327,837	\$ 261,211	\$ 321,211	\$ 2,076	\$ 154,995	\$ 5,000	\$ 68,865	\$ 13,572	\$ 76,702
Applications Received June 30, 2022									
Historic Bluffton Arts & Seafood Festival	\$ 80,000	\$ 80,000	\$ 80,000	\$ -	\$ 53,528	\$ -	\$ 26,472	\$ -	\$ -
Total Grants for 4th Quarter Payments	\$ 80,000	\$ 80,000	\$ 80,000	\$ -	\$ 53,528	\$ -	\$ 26,472	\$ -	\$ -
Applications Received September 30, 2022									
Farmers Market of Bluffton	\$ 50,500	\$ 50,500	\$ 50,500	\$ -	\$ 16,951	\$ -	\$ 17,409	\$ 16,140	\$ -
May River Theatre, Inc.: Advertising for 2023 Season	38,715	38,715	38,715	-	24,187	-	11,918	2,610	-
Lowcountry Online Journalism Initiative: Bluffton Newcomers Guide	29,500	-	-	-	-	-	-	-	-
Town of Bluffton: Squire Pope Carriage House Restoration	457,026	457,026	457,026	-	-	-	-	-	457,026
Total Grants for 1st Quarter Payments	\$ 575,741	\$ 546,241	\$ 546,241	\$ -	\$ 41,138	\$ -	\$ 29,327	\$ 18,750	\$ 457,026
Applications Received December 31, 2022									
Palmetto Bluff Conservancy: Dubby Boat for Tours	\$ 35,000	\$ 35,000	\$ 35,000	\$ -	\$ 17,500	\$ 17,500	\$ -	\$ -	\$ -
The Rotary Club of Bluffton: Mayfest Weekend in Bluffton (2023)	15,000	15,000	15,000	-	-	-	6,734	8,266	-
Old Town Bluffton Merchants Society: Bluffton as a Destination	14,000	14,000	14,000	-	5,070	-	8,930	-	-
Total Grants for 2nd Quarter Payments	\$ 64,000	\$ 64,000	\$ 64,000	\$ -	\$ 22,570	\$ 17,500	\$ 15,664	\$ 8,266	\$ -
Applications Received March 31, 2023									
BlacQuity: Roots & River Festival	\$ 28,135	\$ 11,000	\$ 11,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 11,000
Bluffton MLK Observance Committee: Bluffton Juneteenth Celebration	20,000	20,000	20,000	-	13,571	-	-	-	6,429
Hilton Head Symphony Orchestra: 2023 Bluffton Concerts	48,628	48,628	48,628	-	-	-	40,497	8,131	-
Historic Bluffton Foundation: Heyward House Welcome Center	150,000	150,000	150,000	-	-	-	21,757	-	128,243
Society of Bluffton Artists: Promoting the Arts in the Lowcountry and Beyond	15,000	15,000	15,000	-	2,587	-	11,815	598	-
Total Grants for 3rd Quarter Payments	\$ 261,763	\$ 244,628	\$ 244,628	\$ -	\$ 16,158	\$ -	\$ 74,069	\$ 8,729	\$ 145,672
Applications Received June 30, 2023									
BlacQuity: Roots & River Festival - Revised Request	\$ 10,836	\$ 10,836	\$ 10,836	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 10,836
Bluffton Boys & Girls Club: 2023 Bike Bluffton	21,650	21,650	21,650	-	-	-	19,855	-	1,795
Bluffton Gullah Cultural Heritage Center: Exterior/Deconstruction/Stabilization	350,000	350,000	175,000	-	-	-	-	-	175,000
Campbell Chapel Community Development: Restoration of the Historic Campbell Chapel	200,000	138,874	127,000	-	-	-	-	-	127,000
Coastal Conservation Association: Celebrating Conservation Weekend in Bluffton	10,000	10,000	10,000	-	-	-	-	-	10,000
Congregation Beth Yam: Town of Bluffton Hanukkah Celebrations	6,000	6,000	6,000	-	-	-	1,995	4,005	-
Historic Bluffton Arts & Seafood Festival	80,000	80,000	80,000	-	-	-	80,000	-	-
Total Grants for 4th Quarter Payments	\$ 678,486	\$ 617,360	\$ 430,486	\$ -	\$ -	\$ -	\$ 101,851	\$ 4,005	\$ 324,631
Applications Received September 30, 2023									
The New Bluffton Worship: Christmas Eve Under the Stars	\$ 23,110	\$ 15,280	\$ 15,280	\$ -	\$ -	\$ -	\$ 9,070	\$ 6,210	\$ -
Gullah Travelling Theater, Inc.: Gullah Kintfolk Come to Bluffton	18,791	-	-	-	-	-	-	-	-
May River Theatre, Inc.: Advertising & Royalty Funding for 2024 Season	39,801	39,801	39,801	-	-	-	790	-	39,011
Farmers Market of Bluffton: 2024 Expenses	55,300	55,300	55,300	-	-	-	-	-	55,300
Hilton Head Island-Bluffton Chamber of Commerce: 2024 Official Bluffton Vacation Planner	45,000	-	-	-	-	-	-	-	-
Total Grants for 1st Quarter Payments	\$ 182,002	\$ 110,381	\$ 110,381	\$ -	\$ -	\$ -	\$ 9,860	\$ 6,210	\$ 94,311
Applications Received December 31, 2023									
Hilton Head Island-Bluffton Chamber of Commerce: 2024 Official Bluffton Vacation Planner	\$ 45,000	\$ 45,000	\$ 45,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 45,000
Gullah Travelling Theater, Inc.: Gullah Kintfolk Come to Bluffton	26,841	9,750	9,750	-	-	-	-	-	9,750
Old Town Bluffton Merchants Society: 2024 Bluffton as a Destination	28,500	28,500	28,500	-	-	-	-	-	28,500
The Rotary Club of Bluffton: 2024 MayFest Weekend	15,000	25,000	25,000	-	-	-	-	-	25,000
Total Grants for 2nd Quarter Payments	\$ 115,341	\$ 108,250	\$ 108,250	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 108,250
Applications Received March 31, 2024									
Society of Bluffton Artists: 30th Anniversary	\$ 20,000	\$ 20,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Hilton Head Symphony Orchestra: 2024 Bluffton Concerts	43,632	43,632	-	-	-	-	-	-	-
BlacQuity: 2024 Roots & Rivers Festival	25,000	25,000	-	-	-	-	-	-	-
Bluffton MLK Observance Committee	20,000	20,000	-	-	-	-	-	-	-
Historic Bluffton Foundation: Welcome Center at the Heyward House (FY25 Q1)	40,000	40,000	-	-	-	-	-	-	-
Historic Bluffton Foundation: Luke Peoples Music Celebration	5,000	-	-	-	-	-	-	-	-
Total Grants for 2nd Quarter Payments	\$ 153,632	\$ 148,632	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Grants	\$ 2,691,997	\$ 2,432,919	\$ 2,157,414	\$ 9,398	\$ 513,168	\$ 22,500	\$ 326,109	\$ 79,647	\$ 1,206,591

Recommendation of Motions

1. "I make motion to grant the Society of Bluffton Artists \$20,000 in support of the 30th Year Anniversary project as presented in the Staff Report breakdown for advertising and promotion tourism expenses."
2. "I make a motion to grant the Hilton Head Symphony Orchestra \$43,632 in support of the 2024 Bluffton Concerts as presented in the Staff Report breakdown for advertising and promotion of tourism and facilities for civic and cultural events expenses."
3. "I make a motion to grant BlacQuity SC \$25,000 in support of the 2024 Roots and Rivers Festival event as presented in the Staff Report breakdown."
4. "I make a motion to grant the Bluffton MLK Observance Committee \$20,000 in support of the Bluffton 9th Annual Juneteenth event as presented in the Staff Report breakdown for advertising and promotion of tourism, facilities for civic and cultural events expenses, public facilities, and tourist transportation."
5. "I make a motion to grant Historic Bluffton Foundation \$40,000 for fiscal year 2025 quarterly application from July 1, 2024 through September 30, 2024 for Welcome Center services."

TOWN COUNCIL

STAFF REPORT

Growth Management Department



MEETING DATE:	June 11, 2024
PROJECT:	Consideration of an Ordinance to Amend the Town of Bluffton's Comprehensive Plan ("Blueprint Bluffton") to Incorporate a Housing Impact Analysis
PROJECT MANAGER:	Kevin Icard, AICP Director of Growth Management

INTRODUCTION: As set forth in Section 3.3 of the Unified Development Ordinance (UDO), "an application for a Comprehensive Plan Amendment may be initiated by a Town of Bluffton property owner, Town Council, Planning Commission, or the UDO Administrator to address a specific topic or geographic area, or to respond to new information, data, other studies, or an opportunity that would benefit the Town of Bluffton that was not foreseen when the Comprehensive Plan was prepared."

REQUEST: The UDO Administrator requests that Town Council approve an amendment to the Town of Bluffton's Comprehensive Plan ("Blueprint Bluffton") to incorporate the attached Housing Impact Analysis as an addendum. A Housing Impact Analysis, as part of the Town's Comprehensive Plan, is required by Act 57 to allow local governments the opportunity to use up to 15% of their local accommodations tax revenue (ATAX) for the development of workforce housing and to be able to issue bonds to finance workforce housing projects.

PLANNING COMMISSION RECOMMENDATION: Approval of the application (proposed Comprehensive Plan amendment) to Town Council as submitted by Town Staff.

BACKGROUND: In 2023, Act 57 was signed into law to amend the South Carolina Code of Laws to allow local governments the opportunity to use up to 15% of their local accommodations tax revenue (ATAX), as well as revenue remitted to local governments under the 2% ATAX statute, for the development of workforce housing.

The Act defines workforce housing as "residential housing for rent or sale that is appropriately priced for rent or sale to a person or family whose income falls within thirty percent [30%] and one hundred twenty percent [120%] of the median income for the local area, with adjustments for household size, according to the latest figures available from the United States Department of Housing and Urban Development (HUD)." As of April 1, the median household income for Beaufort County is \$106,400.

To receive ATAX funds, the Town must complete a “Housing Analysis” per Sec. 6-4-12 of the South Carolina Code of Laws, which requires an amendment or addendum to the Town’s Comprehensive Plan. The Housing Analysis must include information about the effect of the proposed amendment on housing, including the effect on each of the following:

- The cost of developing, constructing, rehabilitating, improving, maintaining, or owning single-family or multifamily dwellings;
- The purchase price of new homes or the fair market value of existing homes;
- The cost and availability of financing to purchase or develop housing;
- Housing costs;
- The density, location, setback, size, or height development on a lot, parcel, land division, or subdivision; and,
- An analysis of the relative impact of the ordinance on low- and moderate-income households.

“Housing Costs” are those related to the development, construction, financing, purchase, sale, ownership or availability of a median-priced single-family residence.

The Housing Analysis must be submitted to the South Carolina Department of Revenue and the Tourism Expenditure Committee prior to adoption of the amendment by Town Council; however, neither entity is required by state law to review or approve the analysis, according to the Municipal Association of South Carolina.

Once the amendment is adopted, Town Council can apply funds in a variety of ways, including distributing funds to non-profit and for-profit organizations to develop workforce housing, internal transfers for capital projects or debt service on those projects, as well as allocating annual funds for any government-sponsored housing program.* The program to use ATAX funds will end December 31, 2030.

**Source: Burr Forman (2024, April 10), burr.com, <https://www.burr.com/newsroom/articles/recent-changes-to-accommodations-tax-statutes-to-promote-workforce-housing-development>.*

REVIEW CRITERIA & ANALYSIS: When assessing an application for a Comprehensive Plan Amendment, Town Council is required to consider the criteria set forth in UDO Section 3.3.3, Application Review Criteria. These criteria are provided below, followed by a Finding.

1. **Section 3.3.3.A.** Consistency with the intent of the overall policies in the Comprehensive Plan.

Finding. Section 5 (Housing) of Blueprint Bluffton includes analysis and recommendations related to the inventory and diversity of Bluffton’s housing stock and its relative movement within the housing market. Topics include housing make-up, neighborhoods and planned development, market dynamics, affordability, and several other related subjects. The 18

recommendations at the end of this section respond to challenges or opportunities across three related objectives: Add Affordable and Workforce Housing in Bluffton, Expand the Availability of Housing Types to Become a Lifecycle Community, and Protect Existing Naturally Occurring Affordable Housing (NOAH).

2. **Section 3.3.3.B.** Consistency with demographic changes, prevailing economic trends and/ or newly recognized best planning practices that would deem the proposed amendment necessary and proper for the advancement of the Town of Bluffton’s goals.

Finding. The proposed amendments support best-planning practices by looking at alternative options for housing funding sources. Act 57 would allow the Town to use ATAX funds to foster development within the Town.

3. **Section 3.3.3.C.** If applicable, the ability of public infrastructure and services to sufficiently accommodate the requested amendment to the Comprehensive Plan.

Finding. Public infrastructure and services will not suffer due to the requested amendment to the Comprehensive Plan. By allowing the additional funding, money that would have been spent on development could be used on improvements to utilities.

4. **Section 3.3.3.D.** Appropriate and efficient use of public funds, the future growth, development and redevelopment of its area of jurisdiction, and consideration of the fiscal impact on property owners.

Finding. The Town of Bluffton is constantly looking for sources of revenue to assist in the development of affordable housing. By using ATAX to assist in the construction of affordable housing, the Town is leveraging money collected from accommodations taxes.

5. **Section 3.3.3.E.** Enhancement of the health, safety, and welfare of the Town of Bluffton.

Finding. By having an additional funding source for affordable housing, the Town is able to assist in providing safe housing for residents, which supports the general welfare.

6. **Section 3.3.3.F.** Consistency with applicable South Carolina planning law and consideration of case law.

Finding. This amendment is consistent with South Carolina law. Act 57, passed by South Carolina Legislation in May of 2023, enables governments the opportunity to use up to 15% of their local accommodations tax revenue (ATAX).

7. **Section 3.3.3.G.** Impact on the proposed amendment on the provision of public services.

Finding. There is little to no impact on public services.

8. **Section 3.3.3.H.** The application must comply with applicable requirements in the Applications Manual.

Finding. This request complies with all applicable requirements in the Application Manual.

TOWN COUNCIL ACTIONS: As granted by the powers and duties set forth in Sec. 2.2.6.C.3 of the UDO, Town Council has the authority to take the following actions with respect to this application:

1. Approve the application as submitted;
2. Approve the application with amendments; or
3. Deny the application as submitted.

NEXT STEPS:

Comprehensive Plan Amendment Procedure	Date	Complete
Step 1. Planning Commission Public Workshop	April 24, 2024	✓
Step 2. Planning Commission Public Hearing and Recommendation	May 22, 2024	✓
Step 3. Town Council – 1st Reading	June 11, 2024	✓
Step 4. Town Council Meeting – Final Reading and Public Hearing	July 9, 2024 (Tentative)	✗

ATTACHMENTS:

1. Presentation
2. Ordinance & Housing Impact Analysis
3. Planning Commission Resolution

Consideration of an Ordinance to Amend the Town of Bluffton's Comprehensive Plan to Incorporate a Housing Impact Analysis

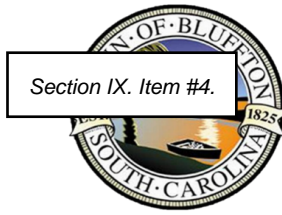
Presentation to Town Council

June 11, 2024

Department of Growth Management

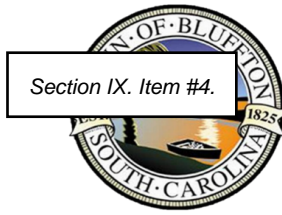
Kevin Icard, AICP

Proposed Comprehensive Plan Amendment



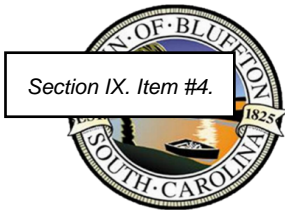
- **State Act 57 (2023):** Allows up to 15% of Town's collected accommodations tax (ATAX) to be used by Town to support workforce housing
- **“Workforce Housing”:** Housing that is 30% to 120% of the local Area Median Income (\$106,400)
- **Potential Yearly Funds:** Approximately \$150k/yr would be available thru December 31, 2030
- **How Funds Can be Used:** Town may distribute to Non-Profit and For-Profit organizations to develop workforce housing, internal transfers on or debt-service for capital projects, funds for government sponsored housing program (e.g., Neighborhood Assistance Program). Also allows Town to issue bonds to develop workforce housing.
- **Comprehensive Plan Amendment:** State requirement along with Housing Analysis
- **State Review Process:** Housing Analysis be submitted to SC Dept of Revenue and Tourism Expenditure Committee before amendment adopted by Town Council

Comprehensive Plan Criteria



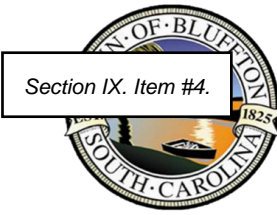
1. **Section 3.3.3.A.** Consistency with the intent of the overall policies in the Comprehensive Plan. **Yes**
2. **Section 3.3.3.B.** Consistency with demographic changes, prevailing economic trends and/ or newly recognized best planning practices that would deem the proposed amendment necessary and proper for the advancement of the Town of Bluffton's goals. **Yes**
3. **Section 3.3.3.C.** If applicable, the ability of public infrastructure and services to sufficiently accommodate the requested amendment to the Comprehensive **N/A**
4. **Section 3.3.3.D.** Appropriate and efficient use of public funds, the future growth, development and redevelopment of its area of jurisdiction, and consideration of the fiscal impact on property owners. **Yes**
5. **Section 3.3.3.E.** Enhancement of the health, safety, and welfare of the Town of Bluffton. **Yes**
6. **Section 3.3.3.F.** Consistency with applicable South Carolina planning law and consideration of case law. **Yes**
7. **Section 3.3.3.G.** Impact on the proposed amendment on the provision of public services. **N/A**
8. **Section 3.3.3.H.** The application must comply with applicable requirements in the Applications Manual. **Yes**

Next Steps



Comprehensive Plan Amendment Procedure	Date	Complete
Step 1. Planning Commission Public Workshop	April 24, 2024	✓
Step 2. Planning Commission Public Hearing and Recommendation	May 22, 2024	✓
Step 3. Town Council – 1st Reading	June 11, 2024	✓
Step 4. Town Council Meeting – Final Reading and Public Hearing	July 9, 2024 (Tentative)	x

Motion



*“I move to **Approve** the Comprehensive Plan Amendment to incorporate the Housing Impact Analysis into the Town of Bluffton Comprehensive Plan.”*

QUESTIONS & DISCUSSION

ORDINANCE NO. 2024 – _____

TOWN OF BLUFFTON, SOUTH CAROLINA

AN ORDINANCE TO APPROVE THE ADOPTION OF AN AMENDMENT TO THE TOWN OF BLUFFTON COMPREHENSIVE PLAN ("BLUEPRINT BLUFFTON") TO INCORPORATE A HOUSING IMPACT ANALYSIS PURSUANT TO THE SOUTH CAROLINA LOCAL GOVERNMENT COMPREHENSIVE PLAN ENABLING ACT OF 1994, AS AMENDED

WHEREAS, pursuant to § 6-29-520(B) of the South Carolina Code of Ordinances 1976, as amended, the South Carolina Local Government Comprehensive Planning Enabling Act of 1994 ("Act") requires an update to the Town of Bluffton Comprehensive Plan and all required elements every ten years; and

WHEREAS, the Town of Bluffton Town Council adopted a comprehensive plan for the Town on September 4, 2007, followed by updates on December 9, 2014 and November 8, 2022; and

WHEREAS, a Comprehensive Plan is a long-range policy document to guide the Town's future development, decision-making and allocation of resources relative to ten required elements as required by the Act, including Housing; and

WHEREAS, the provision of Affordable and Workforce Housing is also one of seven strategic focus areas the Town of Bluffton has identified as a priority within its Strategic Focus Plan for fiscal years 2023-2024; and

WHEREAS, on May 13, 2023, the Governor of South Carolina ratified Act 57, allowing local governments to utilize up to 15% of their local and state collected Accommodations Tax (ATAX) revenue to support workforce housing efforts; and

WHEREAS, S.C. Code Ann. § 6-4-5 (Supp. 2023) and S.C. Code Ann. § 6-4-12 (Supp. 2023) require the completion of a Housing Impact Analysis to obtain ATAX funding, which must be adopted as an amendment to the Housing Element of the local government's approved Comprehensive Plan; and

WHEREAS, S.C. Code Ann. § 6-4-12(F)(Supp. 2023) requires that local governments provide the Housing Impact Analysis to the South Carolina Department of Revenue and the Tourism Expenditure Revenue Committee to receive funding prior the ordinance is considered by the legislative body; and

WHEREAS, the Housing Impact Analysis was sent to the Department of Revenue and Tourism Expenditure Review Committee on May 29, 2024; and

WHEREAS, on April 24, 2024, the Planning Commission conducted a Public Workshop to consider the Housing Impact Analysis as an amendment to the Town's Comprehensive Plan Housing Element; and

WHEREAS, on May 22, 2024, the Planning Commission conducted a Public Hearing to consider the Housing Impact Analysis as an amendment to the Town’s Comprehensive Plan Housing Element, and by a unanimous vote recommended for approval to Town Council; and

WHEREAS, on [DATE TBD], 2024, Bluffton Town Council conducted a Public Hearing to consider the Housing Impact Analysis as an amendment to the Town’s Comprehensive Plan Housing Element; and

WHEREAS, Town Council finds that it is in the best interest of the Town and its citizens and residents to adopt the Housing Impact Analysis as an amendment to the Housing Element of the Town of Bluffton’s Comprehensive Plan (“Blueprint Bluffton”);

WHEREAS, after publication of public notice in the *Island Packet* on [DATE TBD], 2024, in accordance with § 6-29-520 of the Act, the Town of Bluffton Town Council approved the Housing Impact Analysis attached hereto as Exhibit A;

NOW, THEREFORE, BE IT ORDERED AND ORDAINED BY THE TOWN COUNCIL OF THE TOWN OF BLUFFTON, SOUTH CAROLINA, the 2022 Town of Bluffton Comprehensive Plan (*Blueprint Bluffton*), is amended to include a Housing Impact Analysis (attached hereto as Exhibit “A”) to comply with the requirements of the South Carolina Local Government Comprehensive Planning Enabling Act of 1994, as amended, and in accordance with § 6-29-520 of the Act.

THIS ENTIRE ORDINANCE SHALL TAKE FULL FORCE AND EFFECT UPON ADOPTION.

DONE, RATIFIED AND ENACTED this _____ day of _____, 2024.

This Ordinance was read and passed at first reading on this _____ day of _____, 2024.

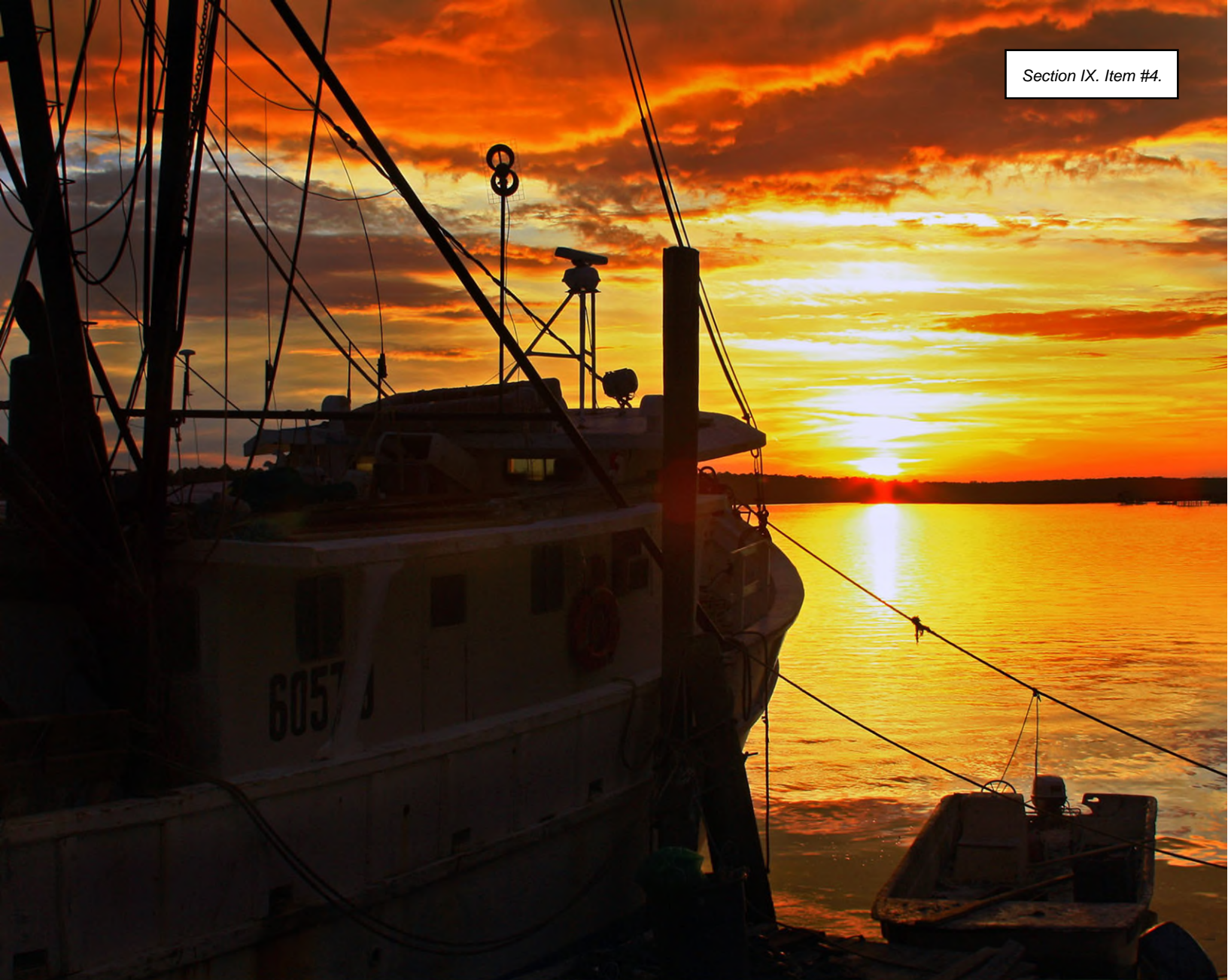
 Larry C. Toomer, Mayor
 Town of Bluffton, South Carolina

 Marcia Hunter, Town Clerk
 Town of Bluffton, South Carolina

A public hearing was held on this Ordinance on this _____ day of _____, 2024.

Larry C. Toomer, Mayor
Town of Bluffton, South Carolina

Marcia Hunter, Town Clerk
Town of Bluffton, South Carolina



THE TOWN OF BLUFFTON

HOUSING IMPACT ANALYSIS

ADOPTED [DATE TBD]

ATTACHMENT 2



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ACKNOWLEDGEMENTS

The Town of Bluffton would like to thank the Town of Hilton Head Island and its staff for being the first jurisdiction in Beaufort County to pursue a Housing Impact Analysis. Given similarities between the two communities, data collected by the Town of Hilton Head Island provided a solid and invaluable foundation for the creation of the Town of Bluffton's own analysis. The Town of Bluffton would also like to thank the following organizations and individuals:

Local Organizations and Individuals:

- Hilton Head Island Area REALTORS
- Jean Beck, CEO, Hilton Head Island Area REALTORS
- Hilton Head Island Area Home Builder Associations (HHAHBA)
- Meg James, Former Executive Director, HHAHAB
- Local Developers and Homebuilders
- Lowcountry Council of Governments

Town of Bluffton Staff:

- Stephen Steese, Town Manager
- Heather Colin, Assistant Town Manager, Planning & Policy
- Chris Forster, Assistant Town Manager
- Kevin Icard, Director of Growth Management
- Charlotte Moore, Principal Planner
- Victoria Smalls, Workforce and Affordable Housing Manager

Town of Bluffton Council:

- Larry C. Toomer, Mayor
- Dan Wood, Mayor Pro-Tem
- Bridgette Frazier
- Fred Hamilton
- Emily Vaux Burden
- With Assistance from:
Lisa Sulka, Mayor (2004-2024)



EXECUTIVE SUMMARY

Housing Impact Analysis

EXECUTIVE SUMMARY

In November 2022, the Town of Bluffton Town Council adopted the Town of Bluffton Comprehensive Plan, *Blueprint Bluffton*. The Comprehensive Plan provides actionable strategies for the Town of Bluffton to pursue over a 10-year period, which includes housing preservation and the production of workforce housing. The Town's Fiscal Year 2025-2026 Strategic Plan also includes actionable items, such as partnering with developers to construct workforce housing on Town-owned properties, incentivizing private sector partners to develop housing options within existing communities governed by development agreements, and continuing to support the Town's Neighborhood Assistance Program.

Most recently, the Town provided \$1.7M in the FY2023-24 budget to support the construction of 12 townhome dwellings for qualified workforce households at 1095 May River Road ("The May"). Also, within the same fiscal year, the Town has provided nearly \$259,000 to support its Neighborhood Assistance Program to ensure that income-qualifying homeowners can obtain maintenance and repairs they would not otherwise be able to afford. The demand is so great that the Town must wait until the new fiscal year to process applications as all non-emergency funds have been expended.

The need for assistance is much greater than the Town can presently provide, which is why other funding sources are critical. Led by State Senator Tom Davis, the passage of Senate Bill "S284 Development of Workforce Housing" (Act 57) will enable the Town of Bluffton to access a new funding source to support the Town's Neighborhood Assistance Program and Community Development objectives. The passage of Act 57 enables local governments to use up to 15% of their Accommodations Tax (ATAX) revenue to support local workforce housing projects and programs, which could be as much as \$152,941 in new funding annually for the Town of Bluffton. The program has a sunset date of December 31, 2030.

To designate any percentage of ATAX funds for workforce housing, the local government must prepare a Housing Impact Analysis (HIA) and provide it to the South Carolina Tourism Expenditure Review Committee (TERC),

Department of Revenue and the members of the local government's legislative body (Town Council) for review prior to the second reading of the ordinance designating ATAX for the purposes of workforce housing. The Housing Impact Analysis must be developed along with the local government's comprehensive plan or be included as an amendment to a previously adopted comprehensive plan. This proposal will be an amendment to the Town's Comprehensive Plan.

To designate any percentage of ATAX funds for workforce housing, the local government must prepare a Housing Impact Analysis (HIA) and provide it to the South Carolina Tourism Expenditure Review Committee (TERC), Department of Revenue and the members of the local government's legislative body (Town Council) for review prior to the second reading of the ordinance designating ATAX for the purposes of workforce housing. The Housing Impact Analysis must be developed along with the local government's comprehensive plan or be included as an amendment to a previously adopted comprehensive plan. This proposal will be an amendment to the Town's Comprehensive Plan.

The urgent need for workforce housing is a focus for the Town, as well as for area employers, but high costs, among other things, make it a challenge to develop. The availability of ATAX as a new funding source for workforce housing can assist both existing and future residents and is in alignment with the Town's FY2025-2026 Strategic Plan. This Housing Impact Analysis addresses the requirements of Act 57, which includes:

- Current housing and employment trends in Bluffton;
- Local analysis of housing and development costs;
- Market-rate housing prices;
- Cost of available financing to purchase or develop housing;
- Local determination of need for workforce housing including income and housing disparities; and,
- ATAX revenue impacts on short-and long-term housing costs.

INTRODUCTION

Section IX. Item #4.



Housing Impact Analysis

ATTACHMENT 2

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INTRODUCTION

The Bluffton community is an economic engine not only for Beaufort County, but for the broader region as well, especially in the last 20 years. Both residents and workers need businesses that offer goods and services to sustain the community; however, the lack of economic diversity leads many residents to shop and seek employment in surrounding communities, such as Hilton Head Island, Savannah, and Burton. Retail and service workers are sourced from the region, including Colleton County and Chatham County (Georgia). An astounding eighty-three (83%) percent of the Town's workers live outside Bluffton. Residents who live in Bluffton primarily have white collar jobs, which are generally defined as people working in an office performing professional, managerial, or administrative work. Nearly 60% of Bluffton residents work in white collar positions, compared to 19% who are blue collar (more labor-intensive workers) and 23% in service-sector positions. A lack of workforce housing is an impediment to recruiting and retaining both private-sector and public-sector employees to meet the community's workforce demands.

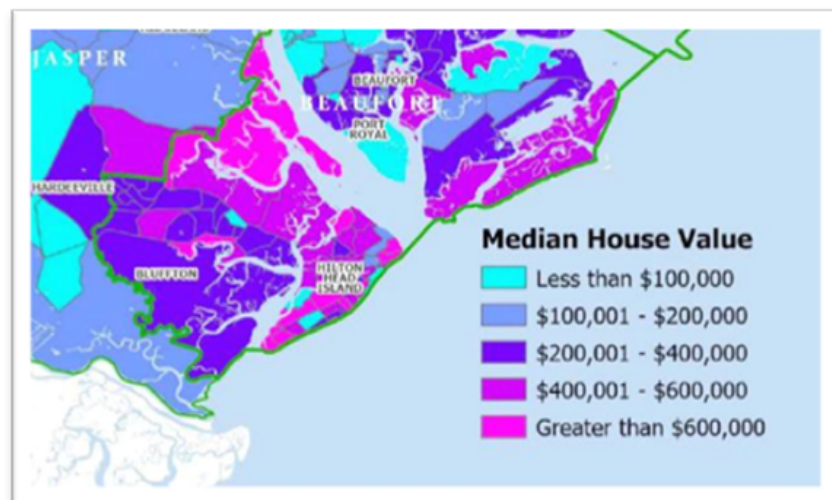
There is a real risk that a lack of workers will lead to a decline in services and overall quality of life in the region. Population shifts over the last 20 years show a significant increase in residents moving to the surrounding communities (see below chart). The median age in Bluffton is 41, which is five (5) years younger than Beaufort County (46), but older than South Carolina and the United States (38). In 2010, the median age for Bluffton was 30.8 years. Compared to the region, Bluffton has a relatively younger population but has experienced gains in residents who are retirement or close-to-retirement age. The number of residents over 65 years old increased four-fold, from 5% of the overall population to nearly 20%, pushing up the median age. More affluent residents increase housing costs.

	Census 2000	Census 2010	Census 2020	Estimates 2021	Percent Change 2000-2010	Percent Change 2010-2020
Beaufort County	120,937	162,233	187,117	186,007	34.1%	15.3%
City of Beaufort	12,950	12,361	13,607	12,899	-4.5%	10.1%
Town of Bluffton	1,275	12,978	27,716	27,596	917.9%	113.6%
Town of Hilton Head Island	33,862	37,099	37,661	38,068	9.6%	1.5%
Town of Port Royal	3,950	10,678	14,220	12,734	170.3%	33.2%

The Town of Bluffton is facing a growing challenge to ensure there is a sufficient supply of workforce housing to support its residents and those who want to live in Bluffton to be closer to their employment. Employers experiencing difficulties recruiting and retaining workers for employment. Working individuals and families are increasingly being priced out of the community and must commute longer distances. The lack of affordable housing impacts everyone in the community, not just those in need of income-appropriate housing.

The ability to attract needed private and public-sector workers partly depends on their ability to afford housing near their jobs. The growth of employment centers in other parts of Beaufort County and the surrounding counties means that Bluffton employers may have a more difficult time finding workers as there are more employment options in adjacent counties, closer to communities where housing is more affordable, and commutes are shorter. Without an intentional effort to expand workforce housing options in Bluffton, both the economic sustainability and quality of life may be at risk. As shown in the map below from the Lowcountry Council of Governments, *2022 People and the Economy Report*, median home values are almost double in the Bluffton area versus neighboring communities such as Hardeeville, Port Royal and Ridgeland.

The preservation of existing housing and development of diverse housing options at varying price points are critical to ensure that Bluffton can house the workforce it needs to sustain its future. In past few years, Town



Council and its leadership team have consistently indicated this goal as a top strategic priority in both the Town's Strategic Plan and its Neighborhood Assistance Program, the latter of which helps income-qualifying residents with a variety of home and property maintenance issues.

BACKGROUND

Section IX. Item #4.



Housing Impact Analysis

In 2010, Bluffton Town Council adopted a Resolution establishing the Affordable Housing Committee to advise the Council on the Affordable Housing–Workforce Housing Program and the Neighborhood Assistance Program. Information on each program follows:

Workforce Housing Program

The Town of Bluffton has established the Workforce Homeownership Program to encourage the construction of owner-occupied workforce/affordable housing. The goals of this program are:

- To create a livable, sustainable community with enhanced quality of life;
- To expand access to quality, affordable housing options for infill development and redevelopment that preserve the Town’s culture, character, and history;
- To improve the quality of existing housing stock by offering options for poor quality housing;
- To increase affordable workforce housing within the Town of Bluffton;
- To increase homeownership opportunities for low and moderate-income families; and,
- To increase opportunities for homeowners to build wealth through equity by offering options to replace manufactured homes with permanent modular constructed homes.

Neighborhood Assistance Program

The Town of Bluffton established the Neighborhood Assistance Program to assist low and moderate-income residents of Bluffton with property repairs and improvements. To qualify for assistance, applicants must have a household income that does not exceed 60% of the Area Median Income (AMI). For example, a gross income of no more than \$60,540 for a family of four would qualify for this program.

Other Town efforts include the following:

On May 10, 2016, Town Council adopted amendments to the Town’s Unified Development Ordinance Article 6, Sustainable Development Incentives, to add general and specific

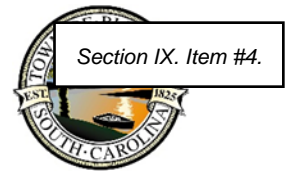
standards applicable to incentivized workforce and/or affordable housing, including density bonuses and application/permit fee reductions.

On November 8, 2022, Town Council authorized the Town Manager to enter into an intergovernmental agreement with Beaufort and Jasper counties, the Towns of Hilton Head Island, Port Royal and Yemassee, as well as the Cities of Hardeeville and Beaufort to contribute funding to establish the regional Beaufort Jasper Housing Trust.

In 2022, the Town began negotiations with a private developer, State of Mind Partners, LLC, to develop housing on Town-owned property at 1095 May River Road. This project consists of 12 townhome units and will be priced for mixed incomes. The units will be designated 60, 80, and 100 below AMI levels of income. Development will begin in Spring, 2024.

During the 2022 Comprehensive Plan update, the reoccurring theme from the focus groups, citizens, staff and Town Council was the need for affordable housing options and the availability of housing catered to people of different ages, family structures and needs. Conversations with the community raised concern with affordability in Bluffton. Residents voiced their concerns over rising costs and sought for the Town to take a more proactive role in enabling a more diverse and affordable housing stock. Two quotes summarized the issue: "I would like my children to live here as they enter adulthood" and "I would like to downsize and stay in Bluffton, but it's a challenge to find this opportunity here." Affordability is not just a Bluffton issue. Leadership across the region must work with their counterparts across jurisdictional boundaries to assist each other.

EMPLOYMENT ANALYSIS



The Lowcountry Council of Governments, *2022 People and the Economy Report* indicated Beaufort County as on one of the top tourist destinations in South Carolina. While this is an enviable position economically, a lack of income appropriate housing and options makes it difficult for employers to recruit and retain workers for tourism-related jobs.

As reflected in the below table, expenditures by visitors increased yearly from 2017 thru 2019, then declined in 2020 due to the COVID-19 pandemic. Visitors have returned to the area, but the workforce to serve them is not adequate, in part, due to rising housing costs. Beaufort County is considered one of the top tourism destinations in the state, having the greatest amount of visitor spending and the largest tourism-generated jobs. Neighboring Colleton County ranks second for tourism expenditures and payrolls due in part to Ashley, Cooper, Edisto (ACE) Basin as eco-tourism destination, as well as several Interstate 95 interchanges.

Table 17: Economic Impact of Visitors 2017-2020

	2017	2018	2019	2020	Percent Change 2017-2020
Beaufort County					
Tourism Employment	14,170	14,590	15,280	14,620	5.6%
Payroll from Tourism	\$261,570,000	\$270,780,000	\$294,880,000	\$307,230,000	23.1%
Expenditures by Visitors	\$1,374,800,000	\$1,433,990,000	\$1,539,740,000	\$1,379,800,000	5.8%

EMPLOYMENT ANALYSIS

CONTINUED

Section IX. Item #4.

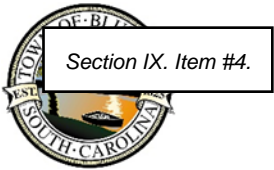
Despite a robust tourism economy in the region, the increased cost of housing impacts the ability of area employers to recruit and retain workers within *all* employment sectors, not just tourism. Although many employers pay above median wages (over \$15/hour), employees continue to be cost-burdened as they balance other household expenses with rapidly accelerating housing costs. Housing affordability is determined by the percentage of an individual's gross pay that is absorbed by housing costs. An "affordable" unit should cost no more than 30% of that individual's or family's total income. Households are considered "cost burdened" when housing costs exceed this figure, and "extremely cost burdened" if spending over 50% of total household income on housing.

There is already evidence of the workforce housing impact. Some local restaurant owners have adjusted their hours of operation because they of a lack of staffing. Healthcare providers are having difficulty retaining key employees, like nurses and technicians. Landscaping companies struggle to find enough people to mow lawns, trim trees and install and maintain landscaping. The public school system faces challenges with teacher recruitment and turnover. Employers consider housing availability and affordability in the region as essential for attracting and keeping qualified workers. Beaufort Memorial offers homebuyer and refinancing assistance to its employees within a 15-mile radius of work.

The ability to live close to work is increasingly difficult as wages are not keeping pace with increased housing costs. As much as eighty-three (83%) percent of Bluffton's workers live outside of town limits, and some commute from outside of Beaufort County. In 2019, 17% of workers commuted more than 50 miles one-way to access jobs in Bluffton. This share increased 41% from 2002. This increase in commuting time is related to compensation and cost-of living in the Town. Workers in Bluffton earn less than residents on average and are finding more affordable housing in communities around the region. As employment increases in the region, however, competition for labor is also intensifying.

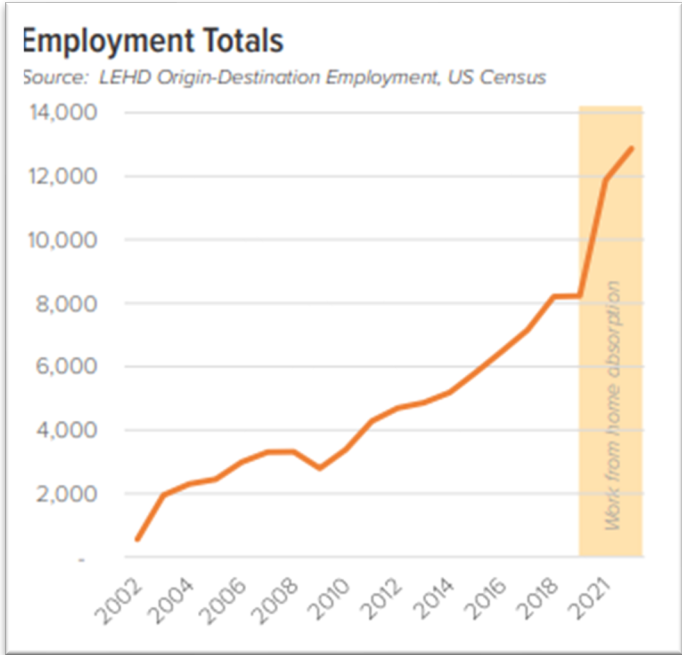
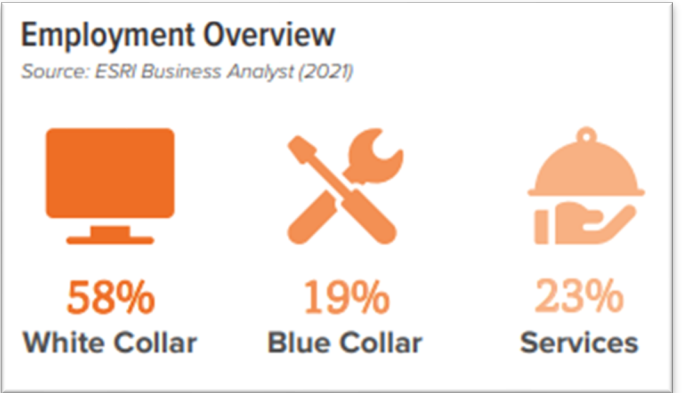
EMPLOYMENT ANALYSIS

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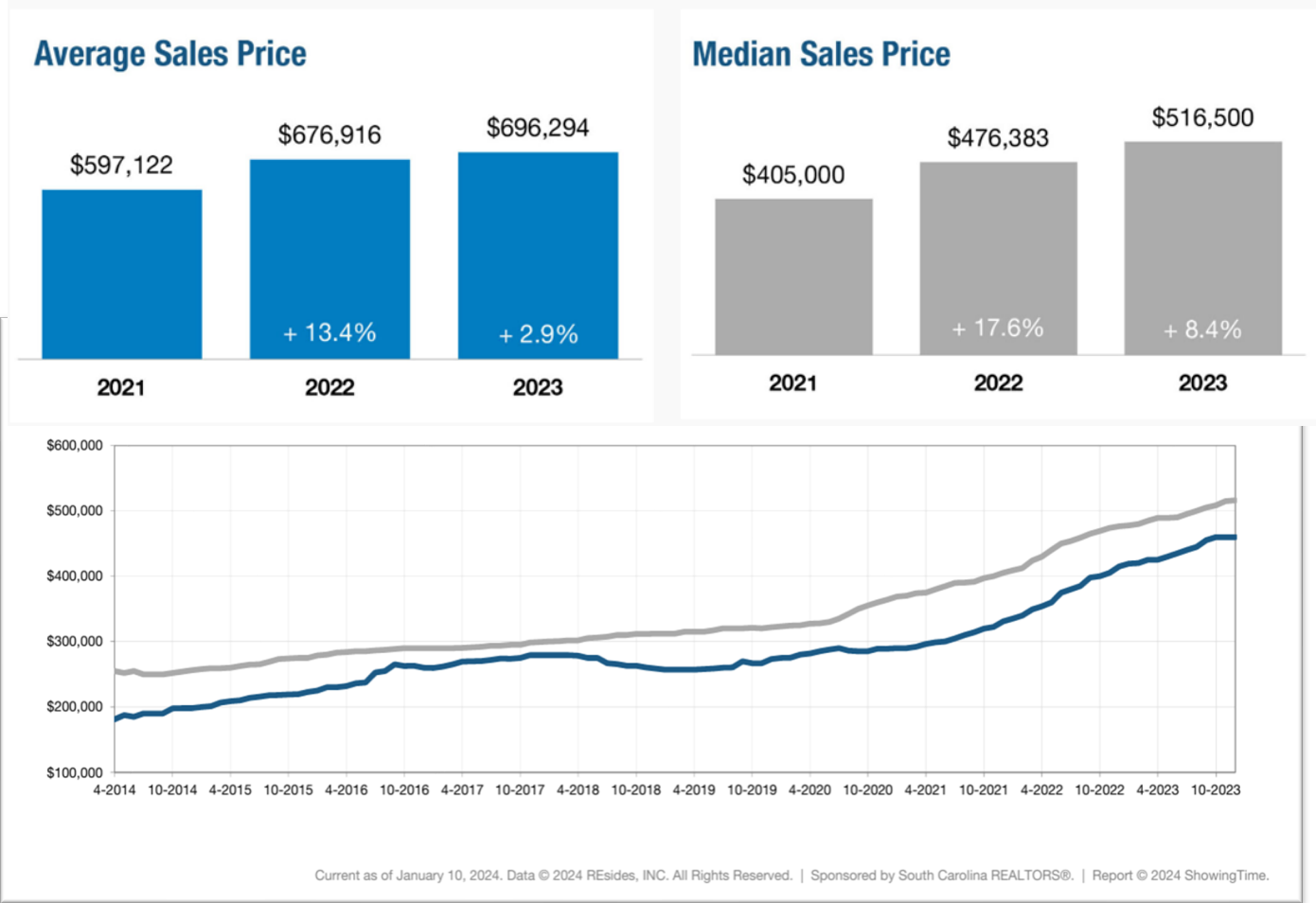
Bluffton hosts close to 13,000 jobs, covering a diverse range of industries. Education and healthcare make up the largest share of the local economy serving the local and regional population. Jobs in finance, real estate and professional services are also commonly represented in the community. Together these employment sectors comprise nearly one-half of the jobs in Bluffton. The community’s coastal location and proximity to Hilton Head Island also generates robust employment in accommodations, food services and entertainment.

Residents who live in Bluffton primarily have white collar jobs, which are generally defined as a person working in an office performing professional, managerial, or administrative work. Nearly 60% of Bluffton residents work in white collar positions, compared to 19% who are blue collar (more labor-intensive workers) and 23% in service-sector positions. Slightly more than 20% of Bluffton’s jobs are in finance, real estate and professional services, which align with white-collar workers. This indicates that many residents of Bluffton are likely traveling outside of the community for work. Based on commuting pattern data from 2019, nearly as many people travel to Bluffton for work as those who are leaving to access jobs in other areas. The most common destinations for Bluffton residents to commute for work are Hilton Head Island, Savannah, and Burton. Commuting patterns, as demonstrated in Bluffton, often indicate a mismatch between the jobs that are offered in a community and the skills and education levels of the residents.



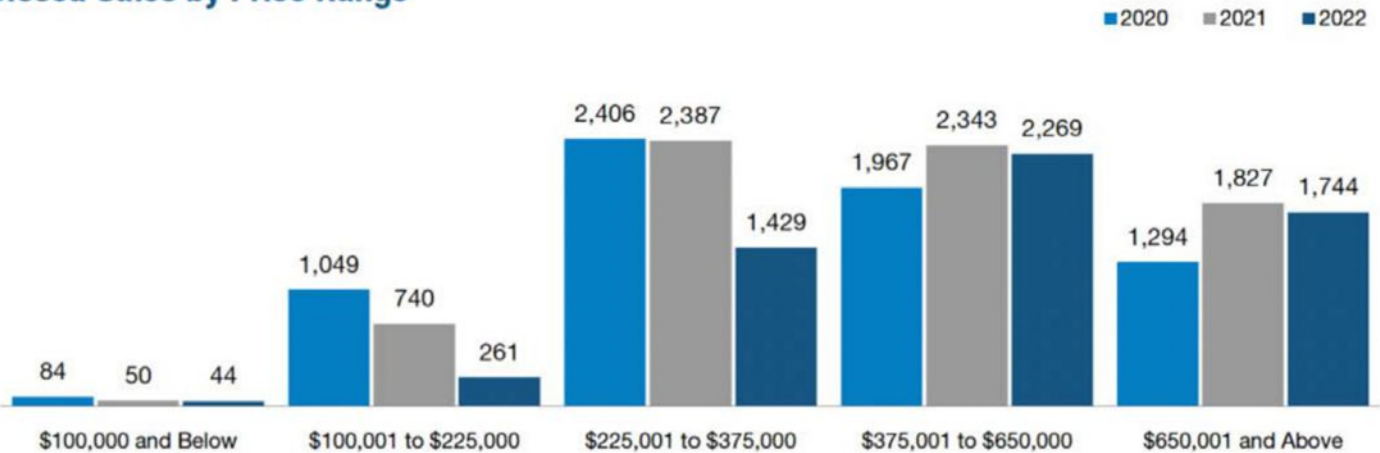
The 2023 National Low Income Housing Coalition’s Out of Reach Data provides the hourly wage necessary to afford a market rate rental unit by zip code. For the 29910 zip code, the greater Bluffton area, the hourly rate for a position in the Accommodations and Food Preparation sector for the region was \$13.32. However, an employee must have earned at least \$28.85 to afford a one-bedroom apartment in Bluffton. Based on this analysis, within all major employment sectors, employees in the region would be “Cost Burdened”.

The Hilton Head/Bluffton 2024 Annual Market Analysis indicated a significant increase in housing costs for homeowners of both single family attached and detached housing types in the area since 2021, and an even greater increase over the last five months of 2023. The following charts show these increases. From 2021 to 2022 the overall median sales price increased 17.6 percent to \$476,383 for the year, and from 2022 to 2023 there was an increase of 8.4 percent to \$516,000.



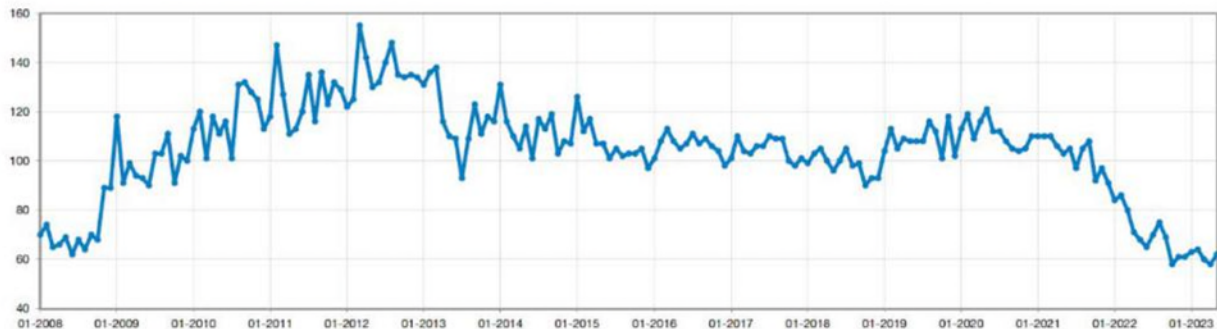
In addition, the number of housing units selling below \$225,000 has declined significantly over the last few years showing a huge loss in affordable inventory. See below chart.

Closed Sales by Price Range



Data from May 2023 indicates historical housing affordability continues to decline significantly. The chart below shows a continual trend as housing becomes less affordable based on average incomes. The lower the number, the less affordable the community. Homeownership is less attainable for potential buyers as average 30-year home-mortgage rates in the U.S. have risen from 3 percent in 2021 to over 7 percent in 2023. Those latest price and interest rate hikes, along with other forces, continue to push the typical cost of major ownership expenses up far faster than wages, resulting in declining home affordability.

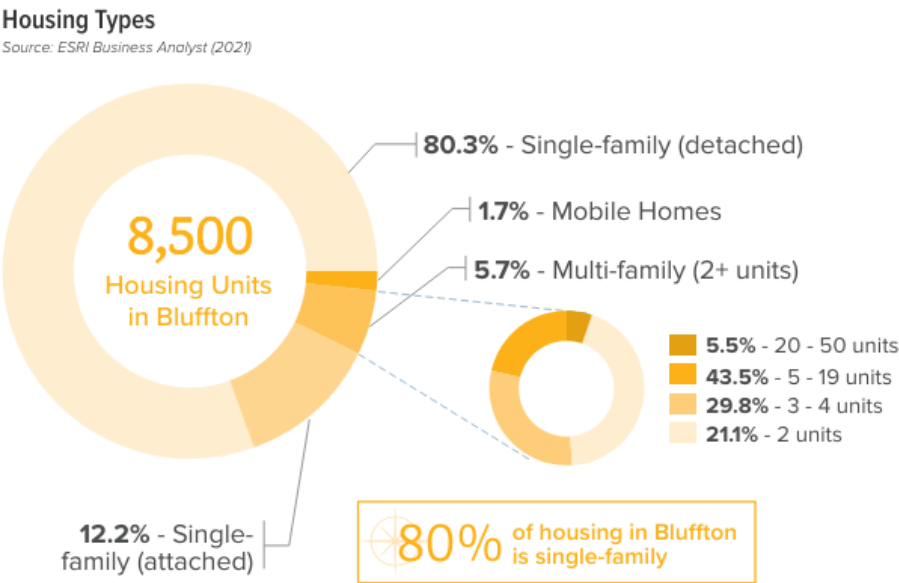
Historical Housing Affordability Index by Month



RENTAL MARKET DATA:

Current trends are unsustainable to meet the growing demands for workforce housing in the region. With increased costs in construction, labor, materials, insurance and interest rates, affordability of housing will play a huge role in the future population and workforce if the Town does not address these growing needs.

Median monthly rent in 2020 in Bluffton was estimated at \$1,747, higher than \$1,030 for Beaufort County and \$688 per month for the State of South Carolina. Nearly one-half of all rental units were built in the last five years. Representing only 5.7% of the Town’s housing stock, multi-family residential rental vacancy rates in Bluffton are exceptionally low, estimated at 0.3%. At the time of preparation of the Comprehensive Plan, only nine apartment units were available in all of Bluffton. This extremely tight rental market does not allow for inter- or intra-market moves, further restricting residential options.



HOUSING MARKET CONDITIONS

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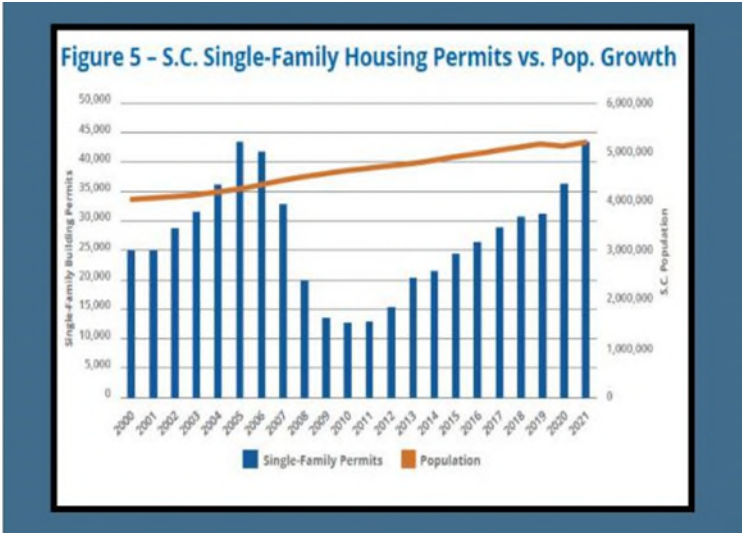
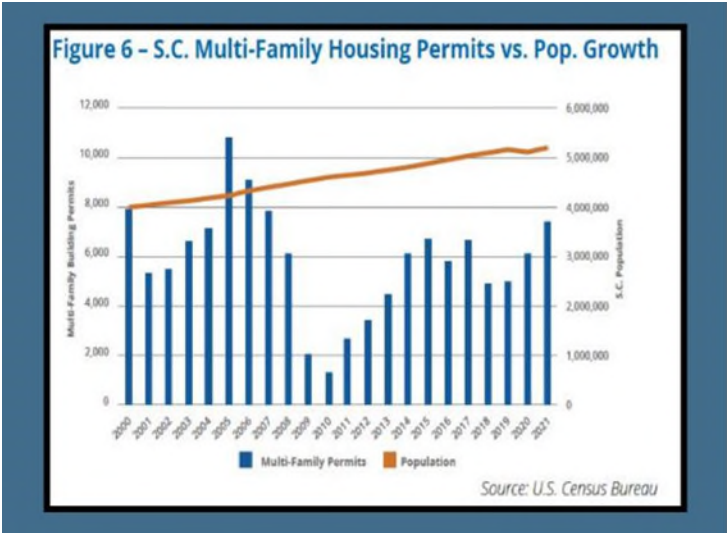


Housing Impact Analysis

Factors in Housing Market Cost:

Although South Carolina continues to have strong population growth, home building has not kept up with this growth. **The 2023 Palmetto State Housing Study** published by SC State Housing indicates that a decade of underbuilding has culminated in a shortage of housing inventory. South Carolina’s population has grown steadily at an average annual rate of roughly 1.2% from 2002 to 2021 (compared to 0.8% nationally), yet the average annual growth rate in the number of new housing permits in South Carolina dropped by nearly a half after the Great Recession of 2008. The decline includes both single and multi-family housing, therefore creating gaps in the supply and demand for housing and escalating the cost of housing due to the shortage of supply. **The lack of housing inventory in South Carolina is especially pronounced among lower price points.**

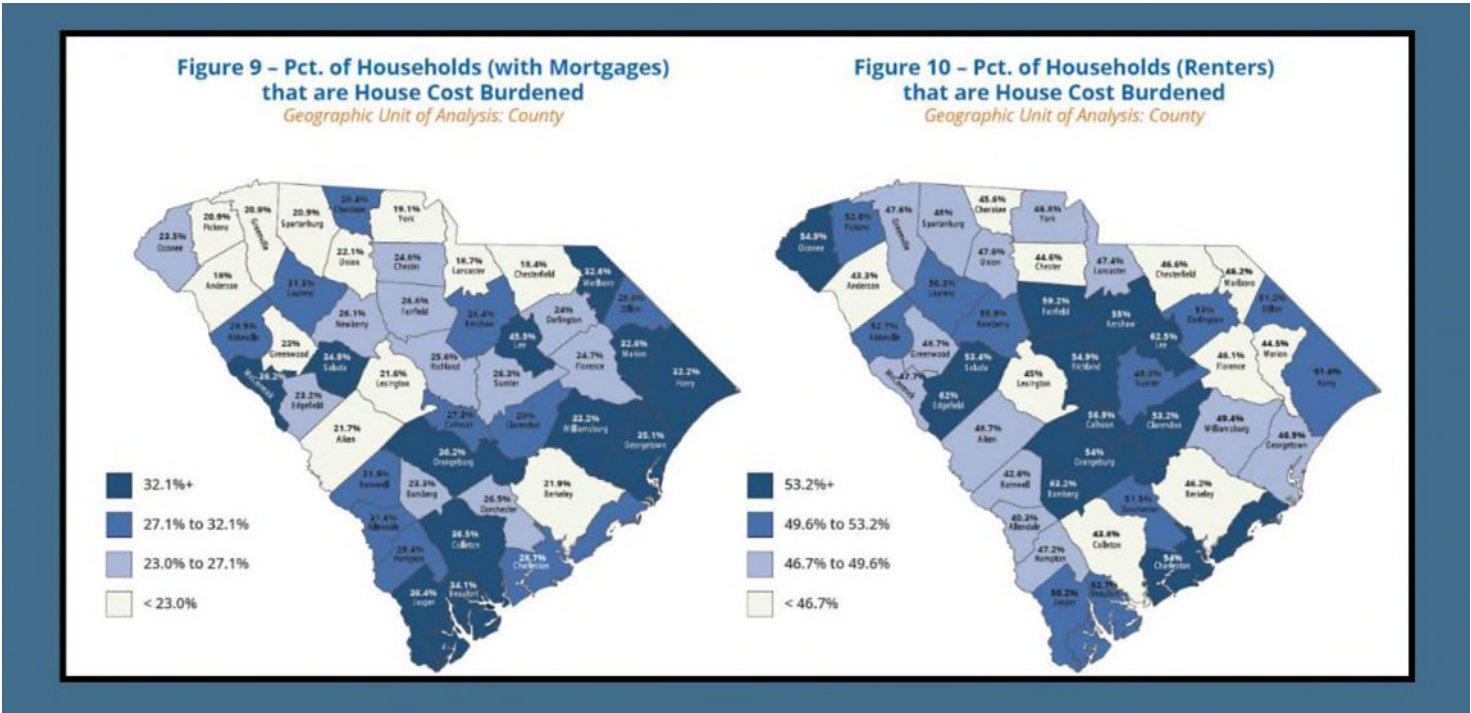
Although a lack of demand in the immediate aftermath of the Great Recession helped temporarily increase the availability of entry-level homes, **the number of homes sold in South Carolina for less than \$100,000 has decreased by 14.8 percent each year since 2014.”** (2023 Palmetto State Housing Study) The decrease in supply is most pronounced in coastal regions of South Carolina. **In 2022, the percentage of homes sold in South Carolina for under \$100,000 fell below 5 percent for the first time.**



The 2023 Palmetto State Housing Study reveals that South Carolina’s housing market is imbalanced due to high demand and low inventory levels. This imbalance has resulted in affordability challenges for many South Carolinians, as shown in the below graphics.

Housing affordability is usually measured by examining the extent to which families are housing cost burdened. **The U.S. Department of Housing and Urban Development (HUD) defines a cost burdened household as one that pays more than 30 percent of its income for housing.**

By this measure, approximately 50 percent of renting households and 25 percent of households with a mortgage are housing cost burdened in South Carolina. Examining housing cost burdens by county reveals that renters are most likely to be cost burdened in the Midlands and coastal regions of South Carolina. By contrast, households with mortgages are most likely to be cost burdened in the Pee Dee and coastal regions, as shown in **Figures 9 and 10. On average, housing cost burdens across the state are higher for renters than they are for households with mortgages.**

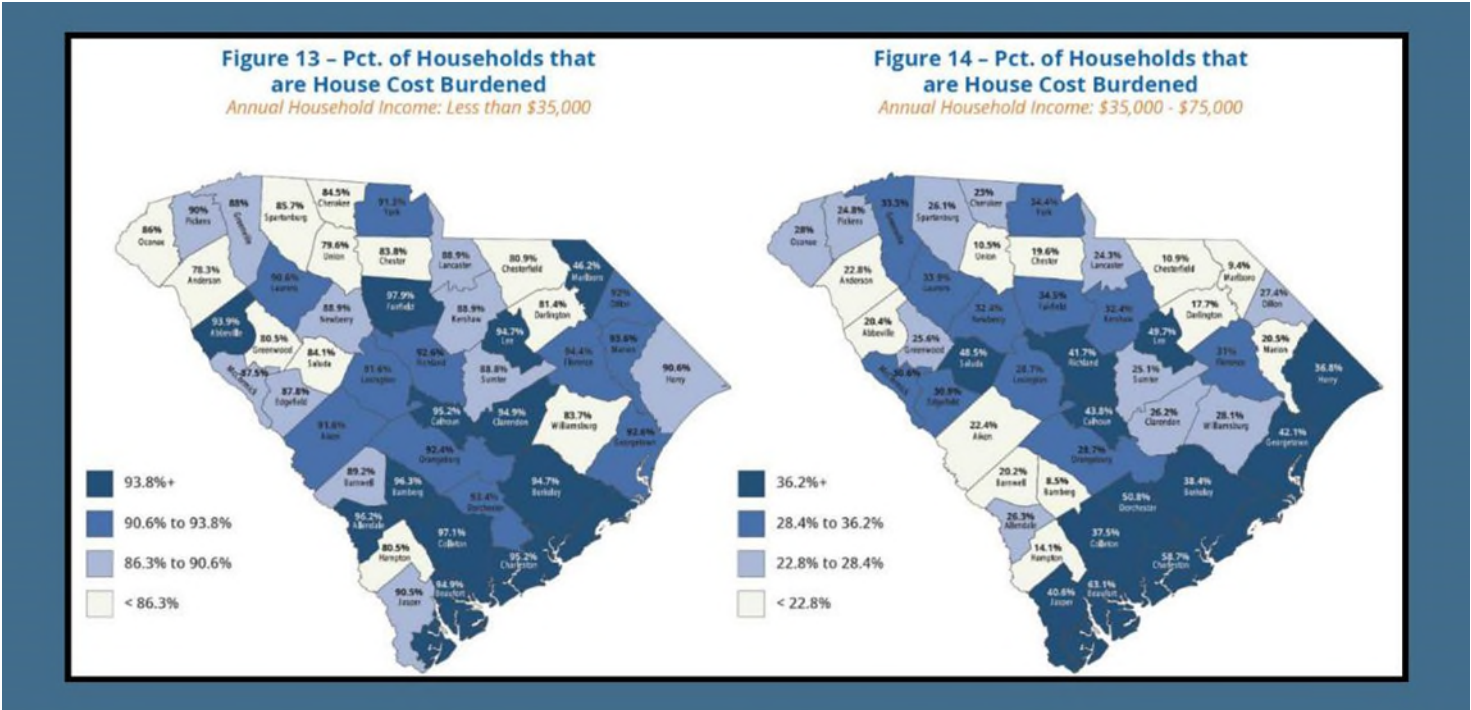




Housing affordability is often considered to be a challenge that is either mostly or exclusively concentrated among households with lower income. Approximately 90% of South Carolina’s lower income households, defined as those earning less than \$35,000 annually, are estimated to be housing cost burdened based on the 2023 Palmetto State Housing Study.

However, there is also a significant population base of middle-income households in South Carolina that also face affordability challenges. Specifically, this study estimates that more than one-third (34.5%) of households earning between \$35,000 and \$75,000 annually are also housing cost burdened by traditional measures. Existing statewide workforce housing initiatives are often designed for this population.

The cost burden of this segment of the population is especially high in coastal South Carolina as shown in Figures 13 and 14. The data demonstrates that while housing affordability is nearly a universal challenge for lower-income households, it is also a significant strain on working-class families. **Policies directed at improving housing affordability should also include attainable housing programs and new inventory for middle-income families.** Individuals in these households are often employed as teachers, first responders, and health care support workers.



HOUSING MARKET CONDITIONS

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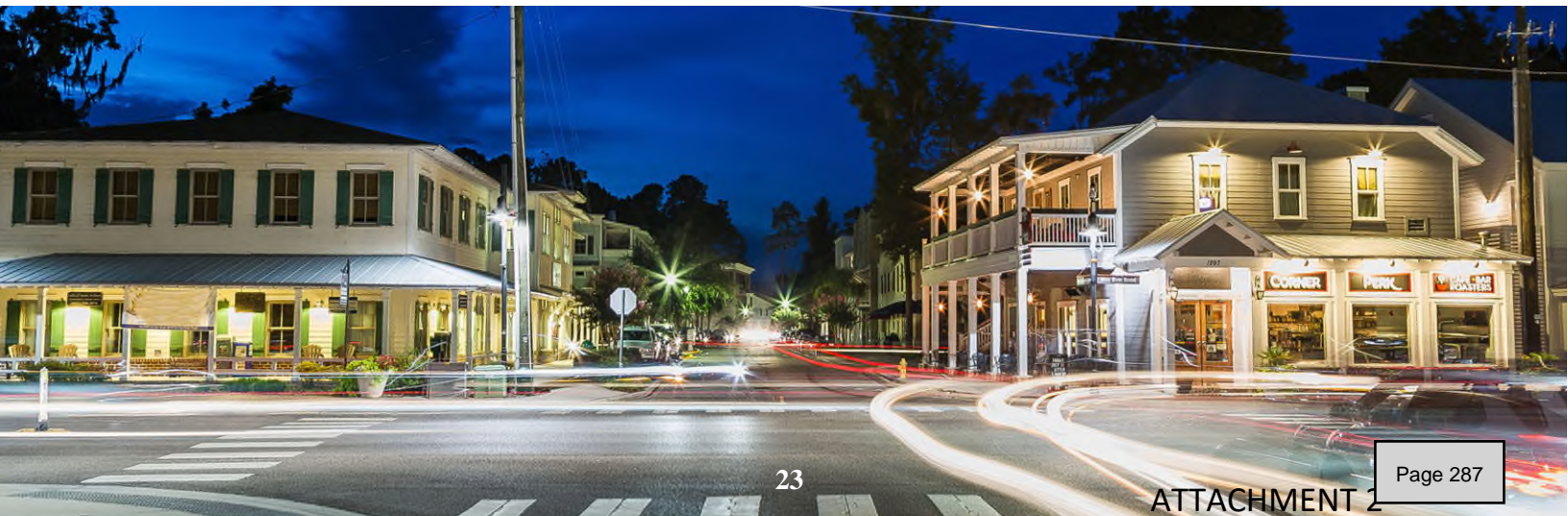
For Homeownership:

- **The average salary in Bluffton is \$58,952. (Salaryexpert.com)**
- **The median home cost in Bluffton is \$494,370. (Zillow.com)**

Based on the US Department of Housing and Urban Development (HUD) rule of thumb for defining “affordability,” a household should spend **no more than three times** its annual salary for costs related to home ownership and **no more than 30% of household income** on rental housing. Based on the above-mentioned average salary in Bluffton, **\$176,856** would be the maximum “affordable” home for a family in the Town of Bluffton. This amount is \$315,000 less than the median priced homes in Bluffton.

Escalating real estate costs are not the only barrier to homeownership. Increased mortgage rates continue to limit affordable home buying opportunities for families. Since August 2023, interest rates have risen as high as 8 percent depending on the loan type and the amount of down payment provided. Credit scores also affect a household’s ability to obtain mortgage. These variables make home buying more difficult for lower income households that have limited or no funds for a down payment and that may also have lower credit scores.

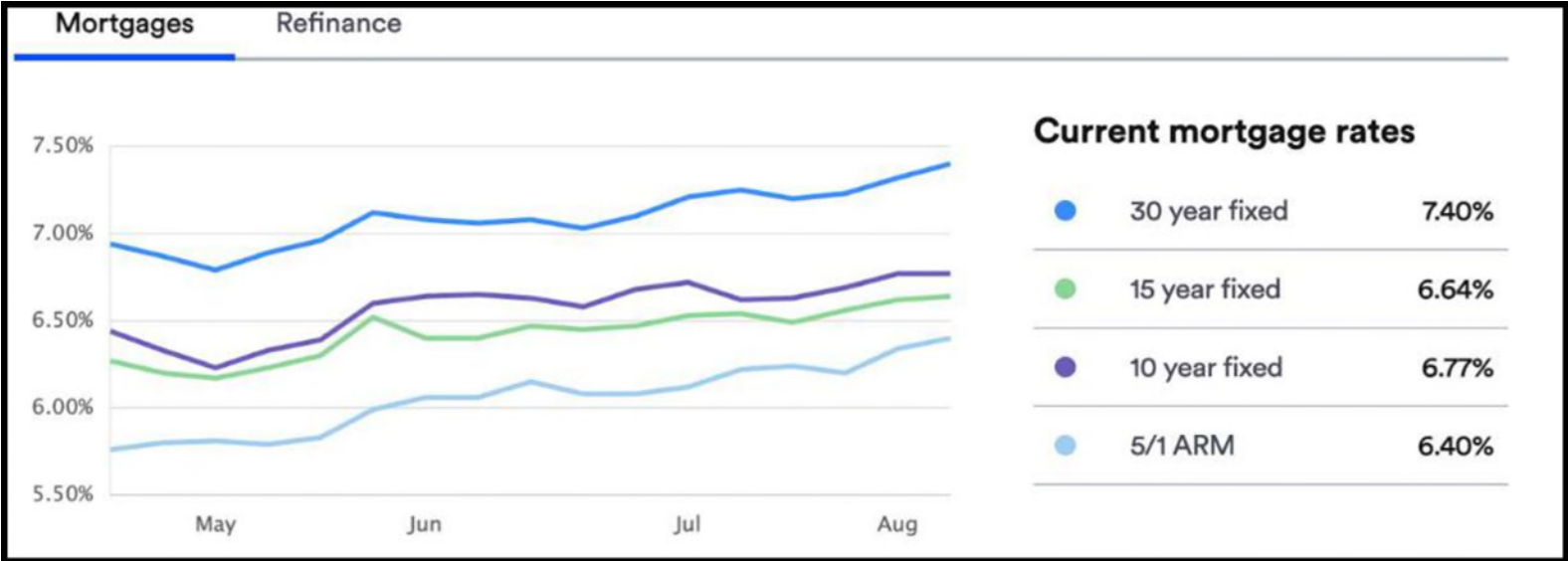
For example, depending on these variables, a **\$200,000 home** could cost a household anywhere between **\$1,222- \$1,444/month**. The lower monthly payment would be a VA or FHA type loan. This scenario also considers a 3 percent down payment and a credit score of 780. This monthly estimate does not include insurance, taxes, or any HOA fees.



HOUSING MARKET CONDITIONS

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The below chart shows a snapshot of mortgage rate options nationally for single family purchases as of August 2023.

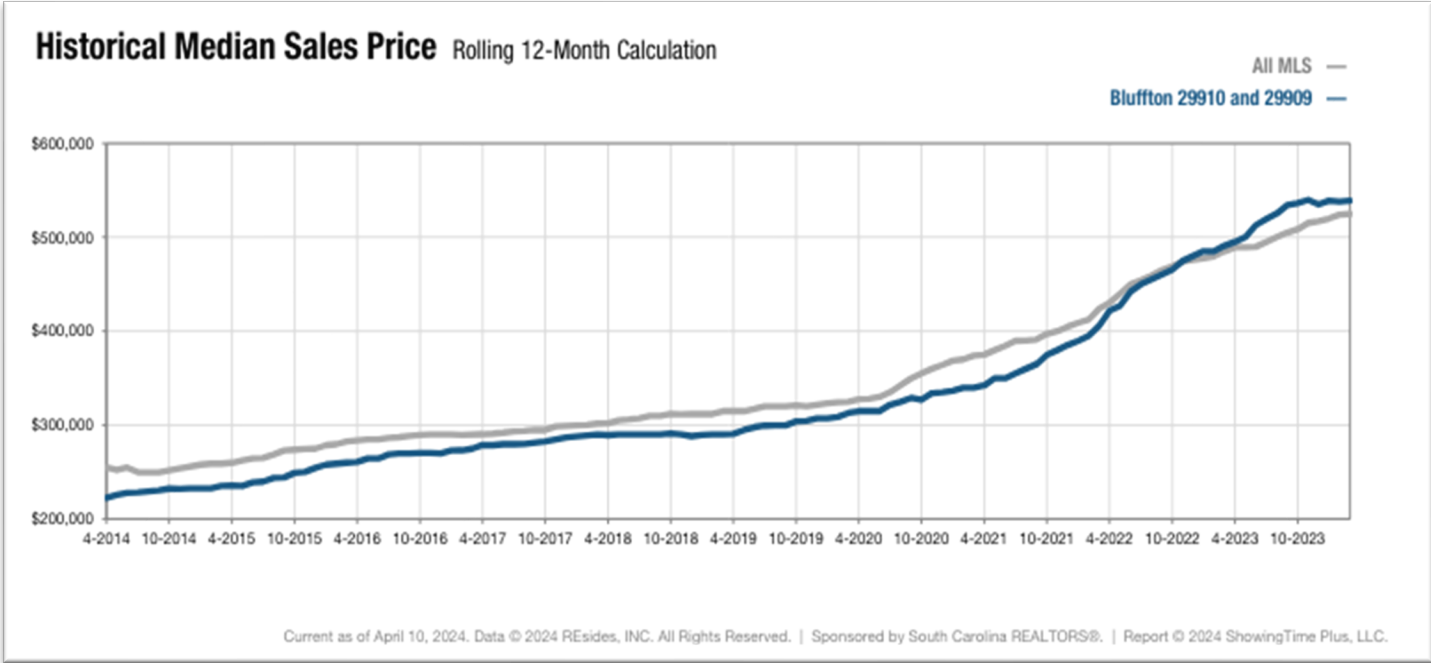


Recent market reports from the Hilton Head Area REALTORS website indicates that there have been double digit increases in housing costs of detached housing.

The graphic on the next page shows almost double digit increases for single family detached homes from 2014 to 2024 (approximately \$225,000 to over \$500,000).



Bluffton Detached (Single Family Home)



Bluffton Key Metrics From 2023 to 2024

Key Metrics	March			Year to Date		
	2023	2024	Percent Change	2023	2024	Percent Change
New Listings	279	277	- 0.7%	634	774	+ 22.1%
Closed Sales	147	194	+ 32.0%	346	478	+ 38.2%
Median Sales Price*	\$512,590	\$516,152	+ 0.7%	\$519,495	\$527,378	+ 1.5%
Percent of List Price Received*	97.9%	98.1%	+ 0.2%	97.6%	98.0%	+ 0.4%
Cumulative Days on Market Until Sale	46	58	+ 26.1%	43	64	+ 48.8%
Inventory of Homes for Sale	422	563	+ 33.4%	--	--	--

* Does not account for sale concessions and/or downpayment assistance. | Percent changes are calculated using rounded figures and can sometimes look extreme due to small sample size.

HOUSING MARKET CONDITIONS

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The 2023 Annual Report on the Hilton Head Region Housing Market shows dramatic increases year after year for Attached (Townhomes) and Detached (Single Family Homes) housing types and includes all properties in the region. Ninety-Two (92%) percent of land in Bluffton is located within a Planned Unit Development (PUD) limiting the amount of available and eligible land that could be used to support the demand for workforce housing.

Of the eight percent of land outside of the Town's PUDs, there is limited developable land due to various conservation easements, environmentally protected areas, wetland areas and heirs' property issues.





In addition to the limited land available to build new housing developments, as well as the low inventory of existing housing units impacting the overall availability of affordable housing, increased insurance costs are also impacting overall household costs. In some cases, insurance costs have doubled for residential and commercial properties, pricing people out of their own homes. For the rental market, insurance premiums are passed along to renters by apartment developers, therefore increasing the cost of rent for many families.

In some cases, rental property owners have converted their "previously affordable" rental properties into higher cost short-term rentals, taking them out of the affordable housing inventory.

In addition to these accelerating housing costs, along with low inventory, a recent 4 millage increase in property taxes for the Beaufort County school district will most dramatically affect properties that are already at a 6% tax rate. These increases are typically passed along to renters. Although the Town of Bluffton recently reduced its millage rate, the Town does not have control over school district increases.



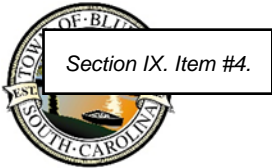
Market Research and the Cost of Housing:

In February 2024, Bluffton home prices were up 11.4% compared to 2023, selling for a median price of \$518K. On average, homes in Bluffton sell after 58 days on the market compared to 50 days last year. There were 78 homes sold in February this year, up from 45 last year. ([Redfin.com](#))

The below chart shows a comparison of Bluffton’s median home price and sales price percentage change with other South Carolina communities and the Charlotte, North Carolina Metropolitan Statistical Area for the past year.

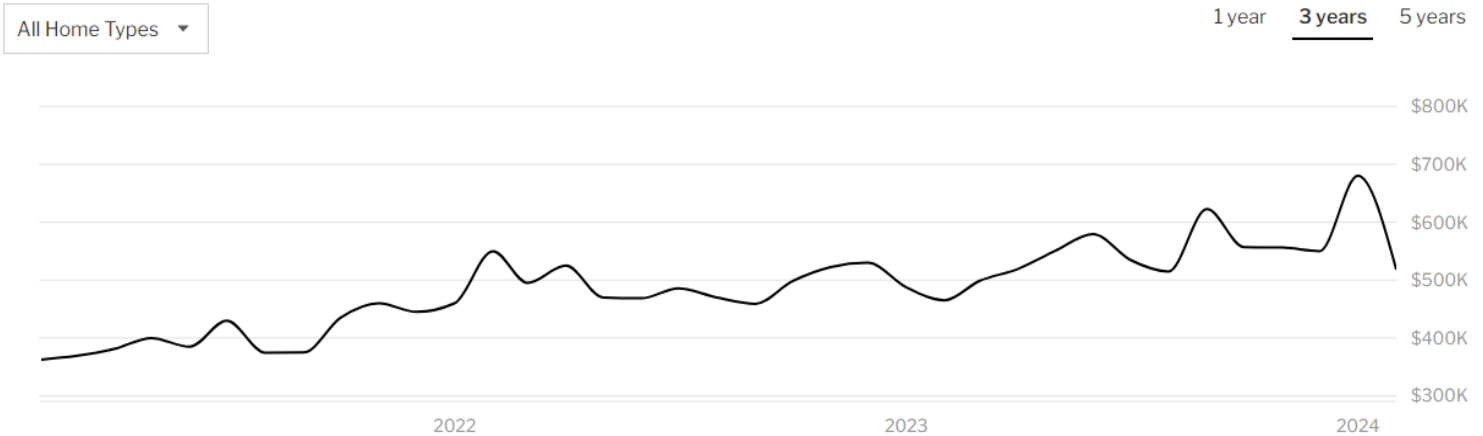
Location	Median Price	% Change from 2023 to 2024
Bluffton	\$518,000	+11.4%
Charleston	\$563,500	+10.7%
Beaufort	\$390,000	+12.4%
Myrtle Beach	\$325,000	+10.6%
Greenville	\$377,500	-10.1%
Charlotte MSA	\$410,000	+1.5%

HOUSING MARKET CONDITIONS

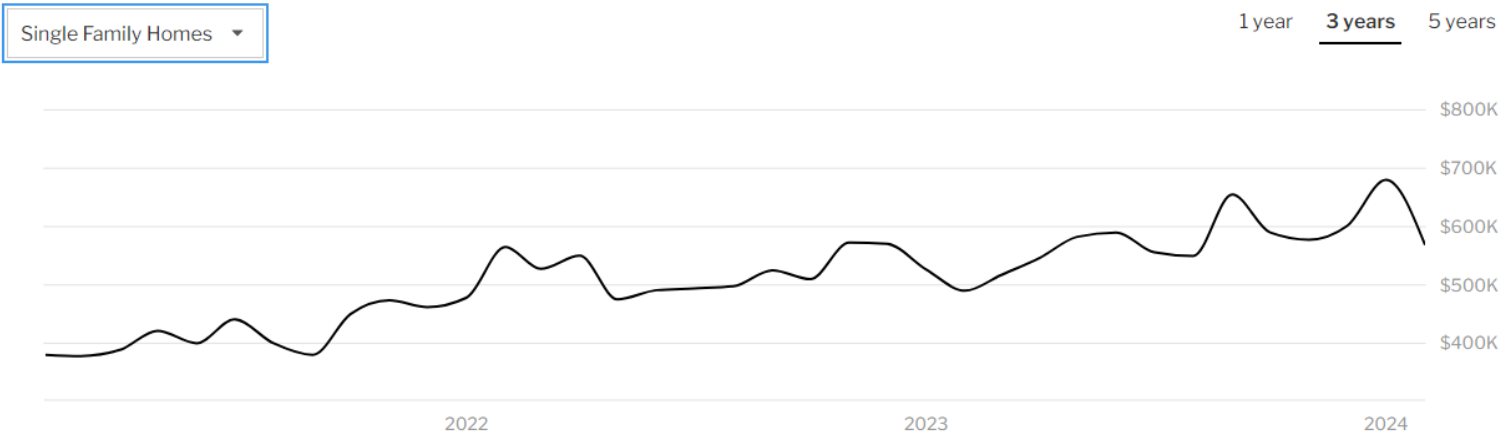


Based on recent data pulled from Redfin calculations of home data from the Multiple Listing Service (MLS) and public records, the following charts show the continued rise in housing costs over the last three years. Charts include: 1) All Home Types listed (villas, condos, townhomes and detached) and 2) Single Family Homes separately.

The chart below shows that, for all housing types (condos, townhomes and single-family ownership), the median sale price from 2020 to 2023 has nearly doubled. For single family homes alone, the median home price is \$568,378.



Based on Redfin calculations of home data from MLS and/or public records.



Based on Redfin calculations of home data from MLS and/or public records.

The overall cost of living in Bluffton is 8% higher than the National average.

CONSTRUCTION AND DEVELOPMENT COSTS

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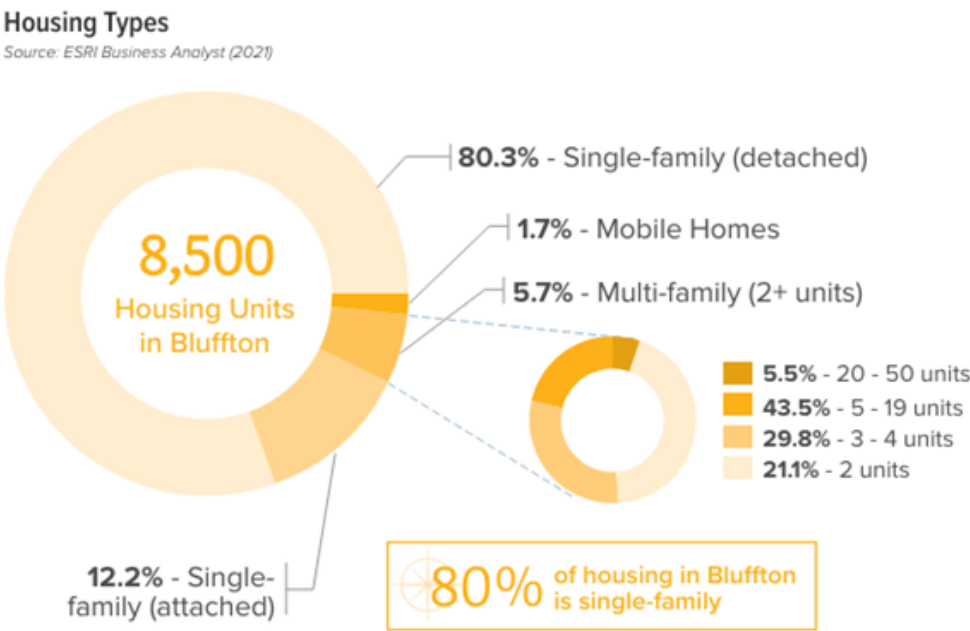


Housing Impact Analysis

Ownership Costs

Construction costs have significantly increased the cost of housing in Bluffton over the past few years. As of March 2024, single family homes were selling on median for \$505,000 with about 40 days on market. The median price per square foot was \$245. In August 2023, [BankRate.com](#) indicated that to afford a \$500,000 house, a household would need to earn a minimum of \$91,008 a year — and probably more to avoid becoming “house-poor” in order to afford day-to-day expenses, maintenance, HOA fees, taxes, while paying other debts, like student loans, credit card and car payments. As a rule, housing costs should not be more than 30 percent of a household’s expenses.

As shown below, 80% of all dwelling units in Bluffton were single-family detached homes in 2021.

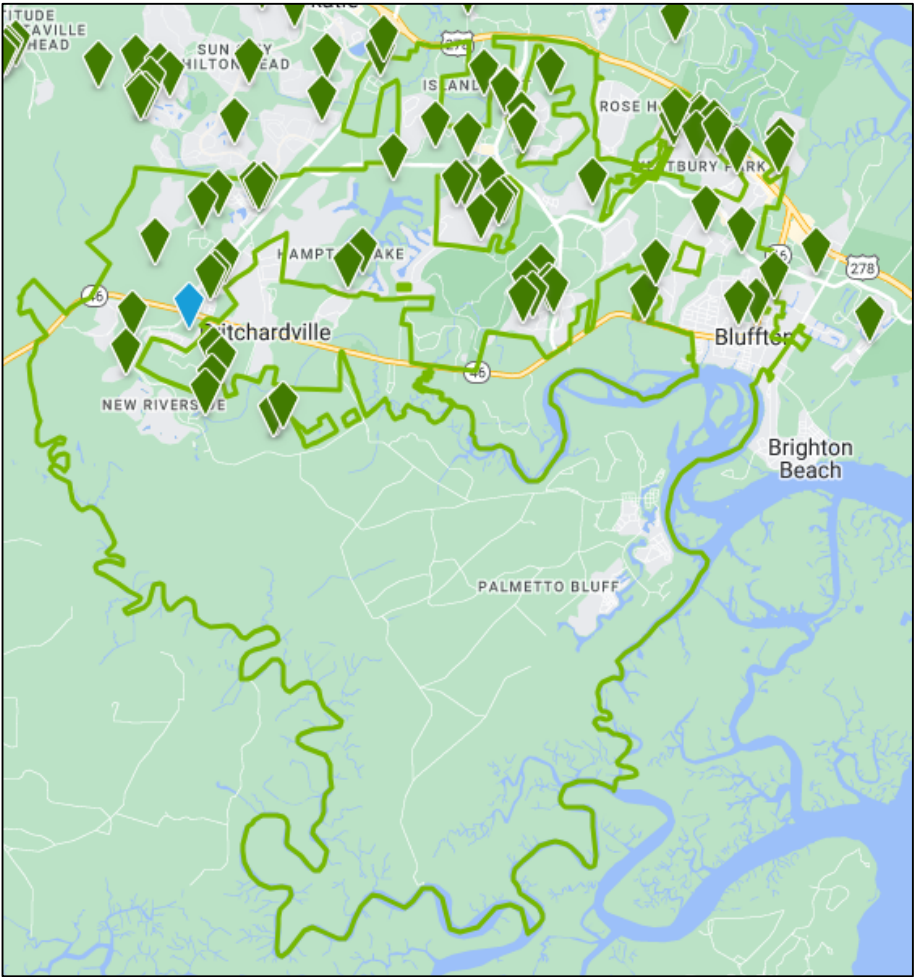




Rental Market Costs

There is limited affordable inventory available in Bluffton to support workforce housing needs. Based on recent research on [Apartments.com](https://www.apartments.com), while there are multiple units available for rent in Bluffton, none were below \$1,450/month at the time of this analysis.

In a market study conducted by RPRG for a proposed tax credit project in Bluffton, market rents for a one-bedroom unit averaged \$1,608 per month. The average one-bedroom unit size was 735 square feet resulting in a net rent per square foot of \$2.19. Two-bedroom unit rents averaged \$1,747 per month. The average two-bedroom unit was 1,052 square feet resulting in a net rent per square foot of \$1.66.



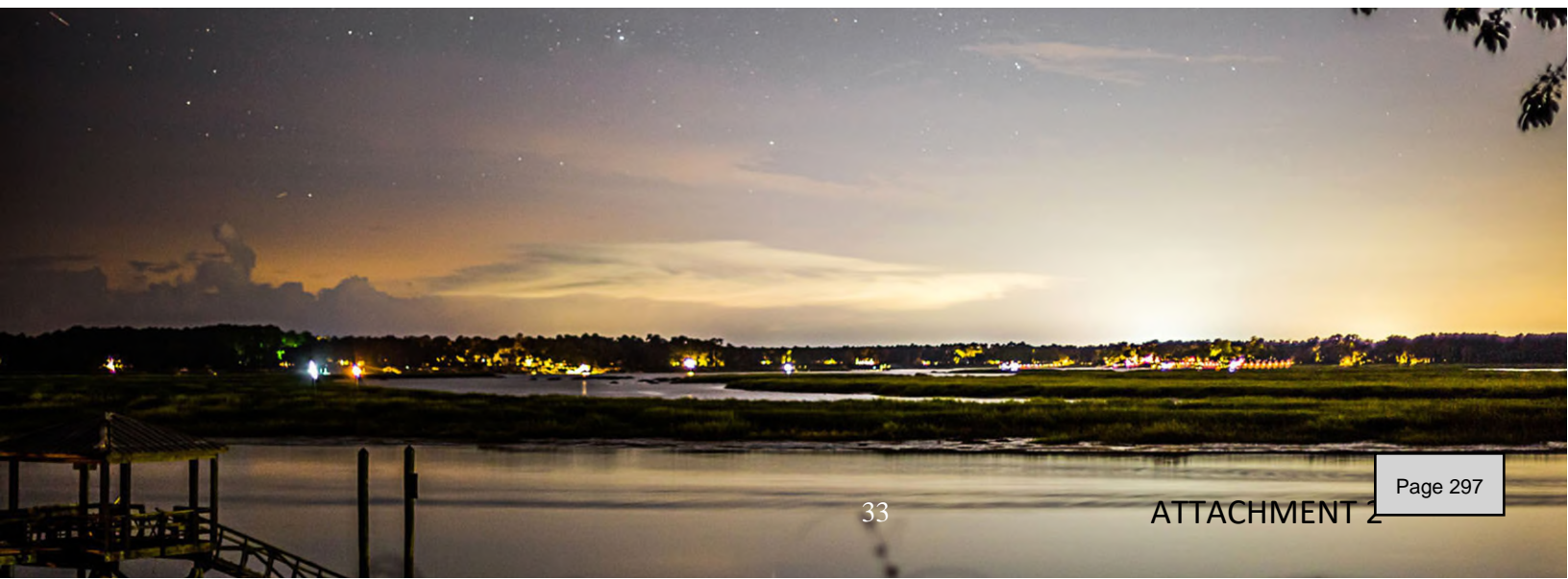
CONSTRUCTION AND DEVELOPMENT COSTS



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A rental development proposed in the Beaufort area that would produce about 100 units of multifamily rental housing for households with income below 60% of the Area Median Income, had a total estimated development cost (not including land) over \$17 million, approximately \$172,000/per unit. Another three-story, 24-unit garden style apartment development costs approximately \$145/square foot to build (not including land). Yet another recently completed project cost over \$213/square foot, approximately \$272,000/unit. All these examples are in the Bluffton or Okatie area, highlighting the overall escalating construction and labor costs in the region without even including land costs (land, site preparation and infrastructure).

Developers interviewed for this analysis indicated land costs in southern Beaufort can be as much \$25,000/unit or apartment. Other fees such as permit fees for the Town of Bluffton and Beaufort County impact fees (water and sewer etc.) can also increase per unit cost to over \$3,000/unit. Parking requirements and site restrictions including setbacks, lot size requirements and lower densities allowed may impact the cost of development. One multifamily developer interviewed indicated that as much as \$50/square per unit could be added to the costs of a project based on some of these limitations. For example, the need for podium parking (parking under the building structure) can increase the cost of a 100-unit development by as much as 18% in development costs. Design flexibility and additional developer incentives will be important to consider as the Town looks to address its workforce housing needs.



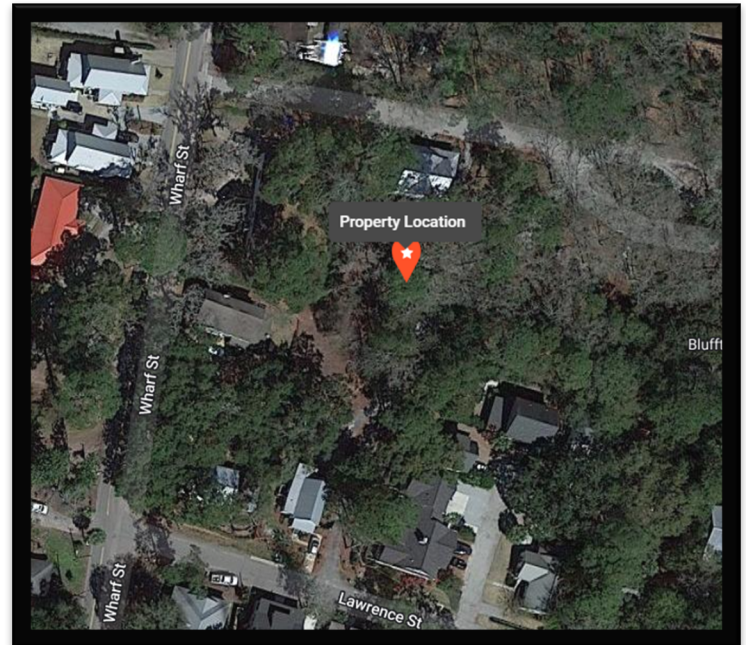
CONSTRUCTION AND DEVELOPMENT COSTS



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Land Costs:

Land costs are extremely high in the Lowcountry. For example, a recent search on Land Watch for vacant lots for sale showed one .16-acre lot in the Old Town Bluffton area for \$220,000. Further, in Bluffton 92 percent of the land in the Town's jurisdiction is located within a Planned Unit Development (PUD) zoning district, minimizing the availability of land for affordable developments even further as governing development agreements were determined years ago without consideration for affordability requirements.



Property acquisitions by the Town indicate average land costs anywhere between \$150,000 and \$250,000 per acre, including the Town's acquisition of 140 Buck Island Road. Although the Town is taking aggressive steps to acquire property for future development opportunities, such opportunities are extremely scarce due to the lack of available land.

Unified Development Ordinance (UDO):

In addition to land acquisition strategies that support workforce housing, the Town is considering updating its Unified Development Ordinance (UDO) as part of its Comprehensive Plan update which will include a variety of planning and zoning tools that would encourage and incentivize private developers to participate in building workforce housing. The Town already offers a density bonus for developers who include a percentage of workforce housing in large developments. The Town also enacted an Economic Development Incentive ordinance to support business development and subsidies for affordable housing.

Workforce housing is a priority for the Town as a part of its Housing Element within Blueprint Bluffton (Town's Comprehensive Plan), as well as Town Council's Strategic Plan.

CONSTRUCTION AND DEVELOPMENT COSTS



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Development Fees:

Although development fees can vary depending on the type of development and its size and the location, these fees can add significant costs to the overall development of both single family and multifamily projects. For example, in Bluffton, fees for a single-family home valued at \$1.3M with about 2,650 heated square feet could be as much as \$18,217. As part of the Town's Workforce Housing program, the Town will re-evaluate its development fees; however, fees are necessary to pay for the staffing and support needed to manage the various development processes. Also, some of these impact and development fees are not controlled by the Town and are required to be paid based on state law, county and school board requirements.

Insurance:

Dramatically rising insurance costs have hit owners, operators, and developers of housing hard in recent years, including rental housing. In an environment of slower rent growth and rising interest rates, these costs have become increasingly tough for many rental housing providers to shoulder. As a result, many firms are in the difficult position of choosing whether to absorb the higher costs--knowing it means less reinvestment in other areas of their businesses or higher rents for residents--or find ways to scale back policies to mitigate the costs thus raising their risk exposure. Continued uncertainty around costs and greater risk burdens creates negative repercussions for multifamily investment and development at a time when more housing is needed to meet the growing demand. Government policies intended to tackle the nation's housing shortage and address affordability challenges must account for the structural problems in today's insurance markets.

A June 2023 article in the Island Packet indicated some insurance costs have increased by 500% from 2022. Several insurance policies for area properties have doubled or tripled in the past two years.



CONSTRUCTION AND DEVELOPMENT COSTS



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In the same Island Packet article, one homeowner of a Hilton Head Island condo indicated that the master building insurance policy went from \$115,223 to \$690,000. Although this example is on the high side, condos owners across Beaufort County are seeing increases, according to several property management companies.

The same article also indicated that in May 2023, the average price of a condo (on Hilton Head Island) was \$452,500, less than half of the \$1,255,000 average home price, according to Hilton Head Area REALTORS market reports. For those with a smaller budget, looking to rent to make extra money or hoping to downsize, condos provide the opportunity to purchase property in a destination location. Yet, increasing insurance rates are adding thousands of dollars each year to the relatively less expensive option.



SOLVING THE TOWN'S HOUSING CRISIS

Section IX. Item #4.



Housing Impact Analysis

SOLVING THE TOWN'S HOUSING CRISIS

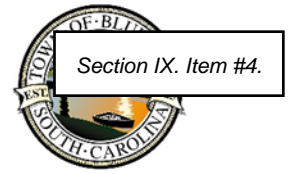
Over the years, Town Council has made affordable workforce housing one of its top priorities, recognizing the critical need to produce and preserve diverse housing options that can meet the workforce and community needs. Sustainable economic growth is part of the solution but is a challenge as the Town's workforce is traveling from or to similarly paying and more proximate job centers. Increased regional competition for workers and the rising housing costs will continue to exacerbate the ability to attract and maintain a sustainable workforce. Additionally, the direct effect this level of daily commuters will have long term impacts on the overall community's quality of life due to increased traffic and infrastructure needs.

The Town is committed to solving its workforce housing challenges by supporting sustainable job growth opportunities and by focusing on the preservation and production of diverse affordable housing options that meet the workforce needs.

To further support the implementation of the Town's Workforce Housing Work Plan, and with the adoption of the Housing Impact Analysis as an amendment to the Town's Comprehensive Plan, the Town can utilize up to 15% of its Accommodation Tax (ATAX) to support critical steps and strategies that will increase the production and preservation of workforce housing Bluffton. Access to this new eligible source of funding could help leverage the Town's initial \$1.7M already committed to the 1095 May River Road housing project (to be known as "The May") and the annual commitment of almost \$300,000 to the Neighborhood Assistance Program. The Town recognizes that funding alone cannot solve the workforce housing shortage and has also committed land for additional housing opportunities in addition to implementing policies for economic development and density bonus programs to encourage and incentivize developers to provide workforce housing.

In addition, the Town has full time staff to the promote workforce affordable housing and provide recommendations on new and innovative housing programs.

SOURCES



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(mortgage rates)
- Rate.com, https://www.rate.com/research/hilton_head_island-sc/price-per-square-foot
- Bankrate.com, <https://www.bankrate.com/real-estate/income-needed-for-500k-home/>

TOWN COUNCIL

STAFF REPORT
Executive Department

MEETING DATE:	June 11, 2024
PROJECT:	Consideration of An Ordinance Authorizing an Economic Development Incentive Agreement between the Town of Bluffton and Palmetto Land Associates, LLC in Support of the Development of 11,800 square feet of Medical and Healthcare Facility Space – Second and Final Reading
PROJECT MANAGER:	David Nelems, DRCI CEO

REQUEST: Request for Town Council to approve second and final reading of an ordinance approving the execution and delivery of an economic development agreement with Palmetto Land Associates, LLC.

CHANGES FROM FIRST READING:

At the request of Council, we have added to the grant agreement a three-year timeframe for the developer to complete his project (9-30-27). If the healthcare component of the development does not open by this deadline the developer will need to seek new approval from Council.

BACKGROUND:

The laws or Constitution of the State of South Carolina, 1895, as amended, empowers towns to enact ordinances related to the expenditure of public funds for public purposes and necessary for the Town to levy certain taxes and fees.

Town residential development has grown exponentially over the past decade. Commercial development has lagged the residential growth. Certain areas of the Town of Bluffton, notably west of Buckwalter parkway, are experiencing a void of commercial development in certain critical service industries. There also remains a lack of affordable housing to accommodate the demand for a diverse local workforce.

In September of 2023 the Bluffton Town Council adopted an Ordinance establishing an economic development incentives plan:

- (i) To promote the redevelopment of existing buildings and infill development within the Incentive Areas;
- (ii) To support the establishment of the categories of new businesses that the Council determines will significantly increase the overall commercial activity within the

Town, provide the Town's residents with sufficient options within the Town rather than having to travel elsewhere; encourage tourists and those who reside in surrounding communities to make use of businesses within the Town; and increase property values within the Town as a whole; and

- (iii) To develop the Incentive Areas into commercial spaces that match the Town's sense of place and contributes to the Council's overall priorities established within our Comprehensive and Strategic Plans; and
- (iv) To support the development of affordable housing to encourage relocation of professionals working in one of the professions supported by the incentivized developments.

The intended use of the development must be for one or more of the following business purposes:

healthcare, dental, home health, pharmaceutical retail, and similar ancillary uses;

- (i) childcare services;
- (ii) affordable housing developments (separately or part of a larger project);
- (iii) mixed use commercial and similar flex-use space;
- (iv) corporate headquarters; and
- (v) other uses, as may be determined by the Council, that are consistent with the Goals, and the Plans.

DISCUSSION:

Staff received a grant request from Rick Maggin, Manager, Palmetto Land Associates, LLC (PLA) on March 22, 2024. PLA intends to build 11,800 square feet medical and health related facilities in the Bluffton Yards development at the corner of SC 170 and Gibbet Rd. If awarded a grant, PLA is willing to dedicate 11,800 square feet of facility space within the development to tenants in the medical and healthcare industries.

The total investment in the project is between twenty-five and thirty million dollars (\$25M - \$30M). It is expected to employ 134 full-time positions of which 42 will be in the medical and healthcare industry. The average annual salary is expected to be \$61,459.

Site development of phase one of the project has been approved. The estimated start is the end of calendar year 2024 with an estimated completion by the end of 2025. The remaining phases are expected to be completed by summer of 2027. The medical and healthcare portion of the development will generate an estimated \$10,850 in property taxes annually and an estimated \$10,000 in business license revenue related to the construction and \$2,500 in business license

The estimated benefit and net revenue to the Town over 5 years are as follows:

Bluffton Taxes / Fees (5 Year Total)	Amount
Initial Building & Development Fees	\$ 45,342
Property Taxes	54,250
Business License Fees	20,000
Total Taxes & Fees	\$ 119,592
Five Year Grant Total	\$ 72,671
Net Revenue (Initial 5 Years)	\$ 46,921

NEXT STEPS: The Town Council may approve the ordinance as submitted, approve with amendments, or deny approval of the ordinance.

ATTACHMENTS:

1. Ordinance
2. Grant Request Letter
3. Project Profile Worksheet
4. Site Plan
5. Building Rendering
6. Motion

**AN ORDINANCE OF THE TOWN OF BLUFFTON, SOUTH CAROLINA,
APPROVING THE EXECUTION AND DELIVERY OF A DEVELOPMENT
AGREEMENT WITH PALMETTO LAND ASSOCIATES, LLC**

WHEREAS, South Carolina law authorizes municipalities to take actions not inconsistent with the Constitution and general laws of the State, regarding any subject the municipality finds necessary and proper for the general welfare and convenience of the municipality, including to execute and deliver contracts, to assist in redeveloping blighted areas, and to expend public funds for economic development; and

WHEREAS, the Council has further determined that the Town should offer certain incentives to encourage private investment and recruit both small businesses and new employers to the Incentive Areas; and

WHEREAS, while the Incentives may benefit the Incentive Recipients (as defined herein), the primary beneficiary of the Incentives will be the Town and its citizens who shall realize the following benefits (the "Benefits"):

- (i) Increased property values within the Incentive Areas and the Town as a whole;
- (ii) Increased revenue from property taxes, business license fees, and permit fees;
- (iii) Increased tourism and commercial activity within the Town as a whole; and
- (iv) Meeting needs of the community residents by encouraging growth within targeted sectors to provide adequate services to Town residents; and
- (v) Assist in providing access to a variety of affordable housing options; and,

WHEREAS, the Incentives, as provided for in an Incentive Agreement (as defined herein), shall be structured in such a way that the value of the Benefits to the Town will exceed the value to the Incentive Recipients; and

WHEREAS, the financial benefit of the Incentives to the Incentive Recipients will only be realized at such time as certain Benchmarks (as defined herein) are met or continue to be met. Should all the Benchmarks be accomplished, the Town believes that there is a high probability that the Benefits will be realized by the Town and that the value of the Benefits will exceed the value public funds expended on the Incentives; and

WHEREAS, Palmetto Land Associates, LLC ("Developer") owns, or intends to purchase, real property (the "Property") in the Town of Bluffton, South Carolina (the "City") and to develop the Property; and

WHEREAS, on the Property, Developer intends (a) to invest over four million dollars (\$4,000,000) to purchase, design, and construct on the property eleven thousand eight hundred (11,800) square feet of medical and healthcare office space (collectively, the "Development"), and (b) create over forty (40) healthcare and medical related jobs, earning an average of sixty one thousand four hundred fifty nine dollars annually (61,459).

BE IT ORDAINED BY THE TOWN COUNCIL OF THE TOWN OF BLUFFTON, SOUTH CAROLINA, AS FOLLOWS:

1. The City hereby authorizes the Town Manager to make minor corrections, execute, and deliver such documents as may be necessary or useful to affect the implementation of the Economic Development Agreement attached to this ordinance.
2. The Project Agreement, with whatever changes are (a) not materially adverse to the Town and (b) approved by the Town Manager (after advice of Town’s counsel), is approved and is incorporated by reference in this Ordinance as if set forth fully in the Ordinance’s body. The Town Manager’s execution of the final Project Agreement shall be conclusive evidence of the Town’s approval thereof.
3. The Town Manager is, acting alone, authorized to take whatever actions and execute and deliver whatever documents (including the Project Agreement) as either of them deems appropriate to affect this Ordinance’s intent.

THIS ORDINANCE SHALL BE EFFECTIVE IMMEDIATELY UPON SECOND READING.

TOWN OF BLUFFTON, SOUTH CAROLINA

Larry Toomer
Mayor

(SEAL)

Attest:

Marcia Hunter
Town Clerk

First Reading: _____

Second Reading: _____

EXHIBIT A

GRANT AGREEMENT

(SEE ATTACHED)

Palmetto Land Associates, LLC

March 22, 2024

John O'Toole
Executive Director
Beaufort County Economic Development Corporation
PO Box 7017
Hilton Head Island, SC 29938

Chris Forster
Assistant Town Manager
Town of Bluffton
PO Box 386
20 Bridge Street
Bluffton, SC 29910

Dear John and Chris,

On behalf of Palmetto Land Associates LLC, we hereby request consideration for a grant, or other incentives as described in the Town of Bluffton Economic Development Incentive Program. Specifically, we request your consideration for assistance with:

1. A grant
2. Planning and permitting fees
3. Business license fees
4. BJWSA's capacity fees
5. Property tax credits
6. Property tax credits for the installation of a fire sprinkler system
7. Additional incentives at the discretion of the Council.

Introduction

Bluffton Yards and the Lowcountry Pickleball Club (LPC) will provide a substantial benefit to the community in the form of enhanced quality of life through a variety of recreation, fitness, health care and retail services. Beaufort County, the Town of Bluffton, private residential developers, and communities will avoid the need to allocate land and capital to build pickleball courts, a high demand amenity for the fastest growing sport in the country. Additionally, the project will provide increased tax revenue, create business and employment opportunities, and increase tourism by putting Bluffton on the map as a world class pickleball destination.

Project: Bluffton Yards

Bluffton Yards is a new lifestyle campus focused on pickleball, health care, fitness, food and beverage, and retail. The initial phase of the project will consist of a first class pickleball club, tentatively named Lowcountry Pickleball Club, that will include (i) a clubhouse with a pro shop, locker rooms/showers, administrative offices, performance training and bar/café, (ii) 1 stadium court, (iii) 6 indoor courts, (iv) 18 outdoor courts, (v) a concession stand, (vi) multiple gathering/game/event spaces, and (vi) a physical therapy office.

Michael and Kelli Ventling, long-time Bluffton residents, will be owners of the club.

LPC will provide a high-quality experience focusing on:

- Professional instruction, competitive play at all levels, and camps
- Tournaments - collegiate, high school, interclub, USTA, and youth league
- Specialty events - corporate meetings, pre-wedding and wedding parties, class reunions, charity, and community events.

The remaining property will host compatible uses including health care, fitness training, food and beverage, retail, and other services.

Project Statistics - Buildings / Capital / Jobs & Medical Use

- 70,000+ square feet of buildings are planned for Bluffton Yards, inclusive of 12,000 sf of medical/health care space. Additionally, the project contains 100,000+/- sf of exterior courts, yard/game areas, dining, and event space.
- We anticipate capital costs to range between \$25 and \$30 million for the project (acquisition, hard and soft costs), inclusive of \$4 million for medical/health space.
- New job projections for the project include 134 total jobs, inclusive of 44 medical/health care jobs and \$7 million in annual gross wages.

Property Ownership

The property was acquired in 2006 by Palmetto Land Associates, LLC (PLA). The principals of PLA include Richard Maggin (a 30-year homeowner on Hilton Head) and Kenneth Maggin, developers/builders, headquartered in the Washington, DC area.

Location

The 10.25-acre property is located on the east side of Okatie Highway, between Gibbet Road and Highland Crossing Drive. The property is part of the Jones Tract PUD and is within the Master Planned Palmetto Point Business Park.

Schedule

We have received approval from the Town of Bluffton for the site development of the first phase of the project, which includes the common areas and the pickleball club. Court Atkins is finalizing the architectural package and plans to submit for the pickleball club building permit in the second quarter of 2024. Pending financing, we plan to begin the site development in the second or third quarter of 2024. The construction term for the first phase is anticipated to take twelve months.

Carolina Engineering, our civil engineer, is finalizing the site plan for the balance of the project. We plan to submit for site plan approval for the other phases as a single submission once the package is ready. We have had preliminary discussions with tenants for the other buildings, however, official marketing will begin once we break ground on the first phase. Construction timeframe for the balance of the buildings is dependent on permitting, lease up and financing. We hope to begin construction in the second quarter of 2025 and are programing completion of the balance of the project 18 months after the issuance of permits and the start of construction.

Plans

Attached are the following plans for your reference:

1. Bluffton Yards Illustrative Site and Phasing Plan
2. Lowcountry Pickleball Club Front Elevation, page A3.0
3. Lowcountry Pickleball Club Renderings, pages RE 1.1 & 1.2

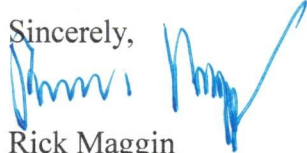
Attachments

Attached are the following documents:

1. Beaufort County Project Profile Worksheet, page 1 & 2
2. Palmetto Land Associates, LLC - New Job Projections Worksheet (including areas highlighted in yellow to indicate medical/health care projections)

Thank you for your consideration. We look forward to working with you and are available to answer any questions you may have.

Sincerely,



Rick Maggin

Manager, Palmetto Land Associates, LLC

Project Profile Worksheet

Project Information	
Company Name:	Palmetto Land Associates, LLC
Project Name:	Bluffton Yards
Type of Project:	Start Up
Type of Entity:	LLC
Type of Business:	
NAICS or SIC Code:	236220
Address:	15 Caine Drive, 50 Estate Drive & 60 Estate Drive
Completed By:	Richard Maggin
Phone Number:	301-943-2717
Email Address:	rick@magginconstruction.com
Date:	3/22/2024



Project Description - Please include the product/service and a brief description of the project including timing.

Development of 10.25 acres of commercial real estate at the Master Planned Palmetto Point Business Park. The property is located on the east side of Okatie Highway, south of Gibbet Road and north of Highland Crossing Drive. The project is currently planned in four phases and will include a pickleball club, food and beverage, medical/health care and retail tenants. Phase 1 includes the pickleball club/health care and the common areas, including storm water, utilities and parking areas. Phase 1 land development permits have been issued and we hope to begin site work in the second quarter of 2024. The building plans for the pickleball club/medical space in Phase 1 are being completed and we anticipate filing for permit processing in the second quarter of 2024. The remaining phases are projected to be submitted for site plan approval as soon as the engineers are able to complete the submission package. Construction of the remaining phases will occur upon lease up and issuance of permits.

Project Alternatives - Are other sites or project configurations under consideration? Please list other potential locations.

We are working with our land planner and civil engineer to evaluate the final positioning, size and configuration of the buildings on the site for the balance of the phases. We do not anticipate major changes.

Estimated Capital Investment	Year 1	Year 2	Year 3	Year 4	Year 5	
	2024	2025	2026	2027	2028	Total
Land Costs & Pre-Development Costs to Date	\$ 3,600,000	\$ -	\$ -	\$ -	\$ -	\$ 3,600,000.00
Building - New Construction	\$ 3,000,000	\$ 12,000,000	\$ 8,000,000	\$ -	\$ -	\$ 23,000,000.00
Building - Purchase of Existing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Building - Renovations						
~Internal Renovations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
~External Renovations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Building - Leasehold Improvements	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Machinery & Equipment - New	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Machinery & Equipment - Used	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Pollution Control Equipment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Capital Investment	\$ 6,600,000.00	\$ 12,000,000.00	\$ 8,000,000.00	\$ -	\$ -	\$ 26,600,000.00

Estimated New Jobs at New Facility					
<i>Jobs are full time employees of the Company</i>	By the end of the First Year of Operation	By the end of the Second Year of Operation	By the end of the Third Year of Operation	By the end of the Fourth Year of Operation	By the end of the Fifth Year of Operation
	2024	2025	2026	2027	2028

Section IX. Item #5.

Employment Category	New Full Time Jobs Created	Avg Hourly Wage	New Full Time Jobs Created	Avg Hourly Wage	New Full Time Jobs Created	Avg Hourly Wage	New Full Time Jobs Created	Avg Hourly Wage	New Full Time Jobs Created	Avg Hourly Wage
Managerial		\$ -	5	\$ 39.60	10	\$ 34.00	6	\$ 34.00		\$ -
Professional		\$ -	3	\$ 16.67	8	\$ 50.00	4	\$ 43.00		\$ -
Technical		\$ -	2	\$ 26.00	11	\$ 26.00	4	\$ 26.00		\$ -
Sales		\$ -	2	\$ 32.50	11	\$ 18.09	6	\$ 29.00		\$ -
Clerical		\$ -	4	\$ 17.00	10	\$ 17.00	6	\$ 17.00		\$ -
Craftsman (skilled)		\$ -		\$ -		\$ -		\$ -		\$ -
Operators (semi-skilled)		\$ -		\$ -		\$ -		\$ -		\$ -
Laborers (unskilled)		\$ -		\$ -	2	\$ 14.00		\$ -		\$ -
Service		\$ -	4	\$ 16.00	26	\$ 16.15	4	\$ 17.00		\$ -
		\$ -		\$ -		\$ -		\$ -		\$ -
		\$ -		\$ -		\$ -		\$ -		\$ -
		\$ -		\$ -		\$ -		\$ -		\$ -
New Job Creation to Date and Avg. Weekly Wage	0	\$ -	20	\$ 24.85	78	\$ 23.63	30	\$ 27.47	0	\$ -

Total New Jobs to SC
134
Total New Medical Jobs
44

Estimated Jobs Relocated to New Facility		
<i>Jobs are full time employees of the Company</i>		
Employment Category	Full Time Jobs	Avg Annual Wage
N/A		\$ -
		\$ -

Estimated Utility Requirements (or increase if expansion):	
Water	TBD
Sewer	TBD
Electric	TBD
Gas	TBD
Use of Port?	NO

Estimated Business Activities:	
Annual Materials Purchased for Operations:	TBD
Annual Number of Visitors to the Facility:	1,000,000
Avg Visitors Length of Stay:	1.5 hours

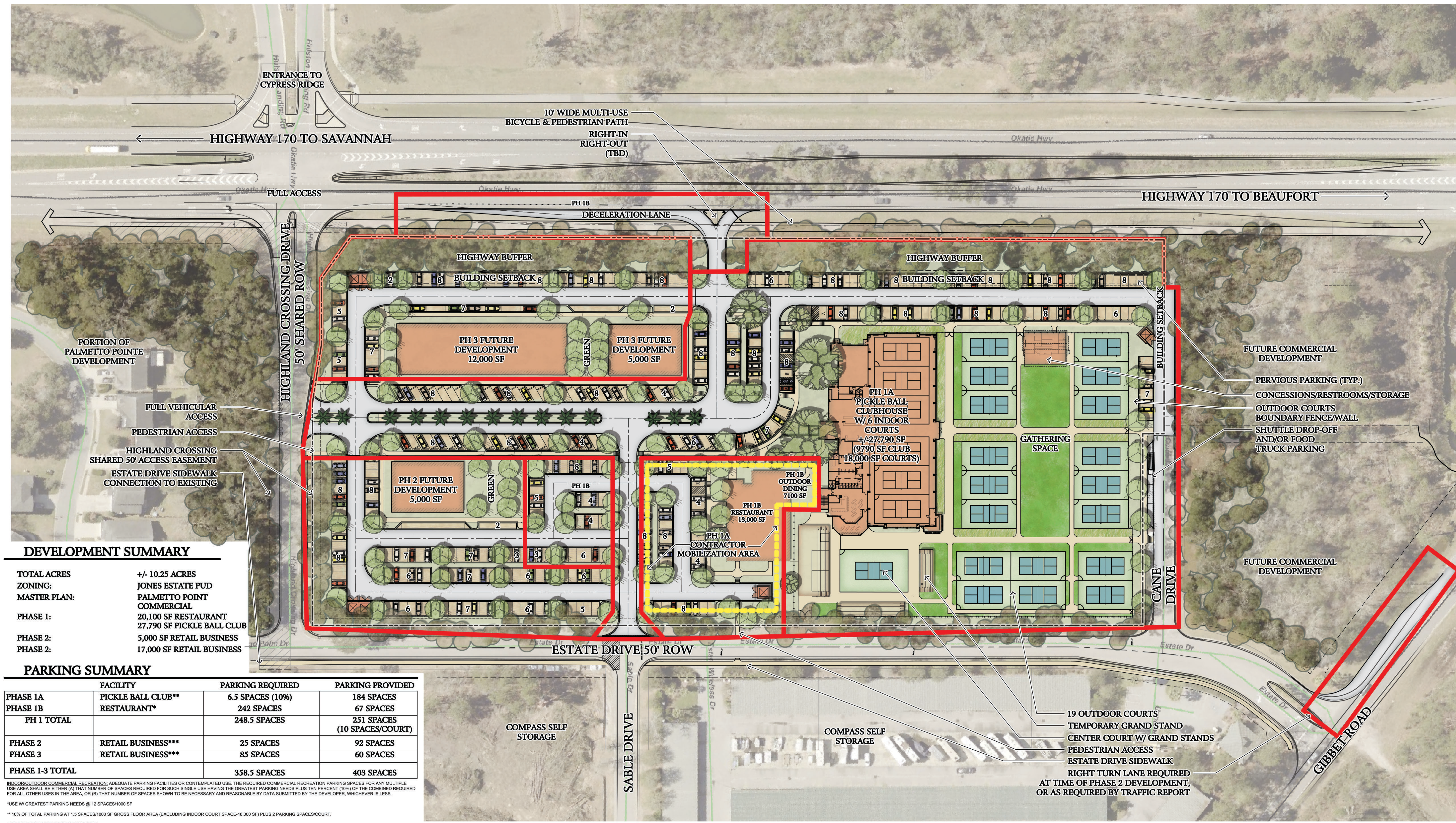
Benefits - Please provide a brief description of the benefit package offered to employees in the area below. Please include percentage paid by employer.
Benefit packages will be addressed by the individual tenants that lease space in the project.

Briefly describe the financing structure for this project.
The land acquisition, carry and pre-construction costs have been financed internally by the owners. We anticipate financing each phase of the project separately. We are currently in discussions with local lenders and anticipate a combination of bank debt and equity for the capital stack.



J. K. TILLER ASSOCIATES, INC.
LAND PLANNING LANDSCAPE ARCHITECTURE
100 MEMPHIS ROAD, SUITE 100 MEMPHIS, TN 38103
Tel. 901/440-0000 Telex 246000-0000

THIS IS A CONFIDENTIAL, MARK UNCLASSIFIED TO CHANGE, ALL STAFFED INFORMATION AND ITS RELATIONSHIP WITH OTHER, SEPARATE VARIETY OF LEARNING SOURCES
STAFF OF CONSULTATION, SEE THE ANY INFORMATION PROCEEDING, ACTIVELY, WHILE THE DATA BASED BASED ON THE INFORMATION



DEVELOPMENT SUMMARY

TOTAL ACRES	+/- 10.25 ACRES
ZONING:	JONES ESTATE PUD
MASTER PLAN:	PALMETTO POINT COMMERCIAL
PHASE 1:	20,100 SF RESTAURANT 27,790 SF PICKLE BALL CLUB
PHASE 2:	5,000 SF RETAIL BUSINESS
PHASE 2:	17,000 SF RETAIL BUSINESS

PARKING SUMMARY

FACILITY	PARKING REQUIRED	PARKING PROVIDED
PHASE 1A PICKLE BALL CLUB**	6.5 SPACES (10%)	184 SPACES
PHASE 1B RESTAURANT*	242 SPACES	67 SPACES
PH 1 TOTAL	248.5 SPACES	251 SPACES (10 SPACES/COURT)
PHASE 2 RETAIL BUSINESS***	25 SPACES	92 SPACES
PHASE 3 RETAIL BUSINESS***	85 SPACES	60 SPACES
PHASE 1-3 TOTAL	358.5 SPACES	403 SPACES

INDOOR/OUTDOOR COMMERCIAL RECREATION: ADEQUATE PARKING FACILITIES OR CONTEMPLATED USE. THE REQUIRED COMMERCIAL RECREATION PARKING SPACES FOR ANY MULTIPLE USE AREA SHALL BE EITHER (A) THAT NUMBER OF SPACES REQUIRED FOR SUCH SINGLE USE HAVING THE GREATEST PARKING NEEDS PLUS TEN PERCENT (10%) OF THE COMBINED REQUIRED FOR ALL OTHER USES IN THE AREA, OR (B) THAT NUMBER OF SPACES SHOWN TO BE NECESSARY AND REASONABLE BY DATA SUBMITTED BY THE DEVELOPER, WHICHEVER IS LESS.

*USE W/ GREATEST PARKING NEEDS @ 12 SPACES/1000 SF

** 10% OF TOTAL PARKING AT 1.5 SPACES/1000 SF GROSS FLOOR AREA (EXCLUDING INDOOR COURT SPACE-18,000 SF) PLUS 2 PARKING SPACES/COURT.

*** 5 SPACES/1000 SF GROSS FLOOR AREA

PREPARED FOR:
PALMETTO LAND ASSOCIATES, LLC
PREPARED BY:



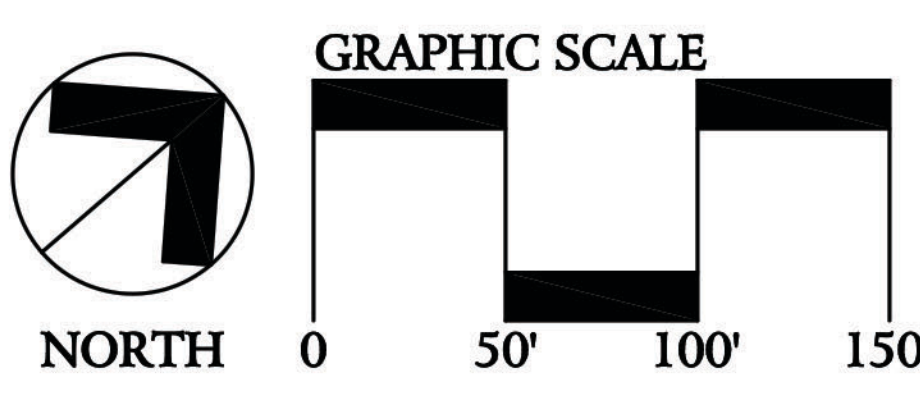
J. K. TILLER ASSOCIATES, INC.
LAND PLANNING
181 BLUFFTON ROAD, SUITE F203
Bluffton, SC 29910
Voice 843.815.4800
jtiller@jktiller.com
Fax 843.815.4802

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BLUFFTON, SC 29910
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Fax 843.815.4802

BLUFFTON PICKLEBALL CLUB

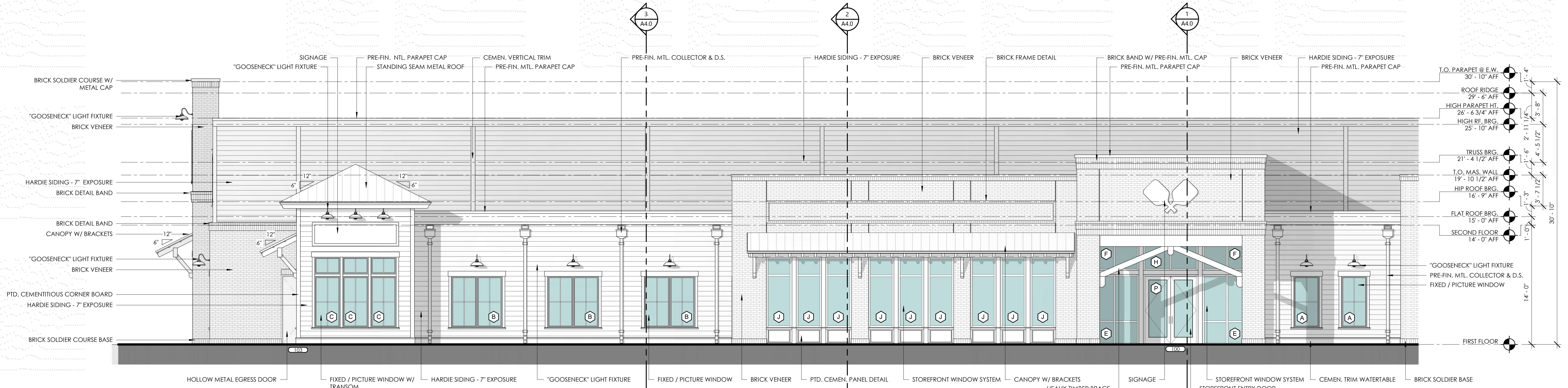
ILLUSTRATIVE SITE PLAN

TOWN OF BLUFFTON, SOUTH CAROLINA
SEPTEMBER 22, 2023

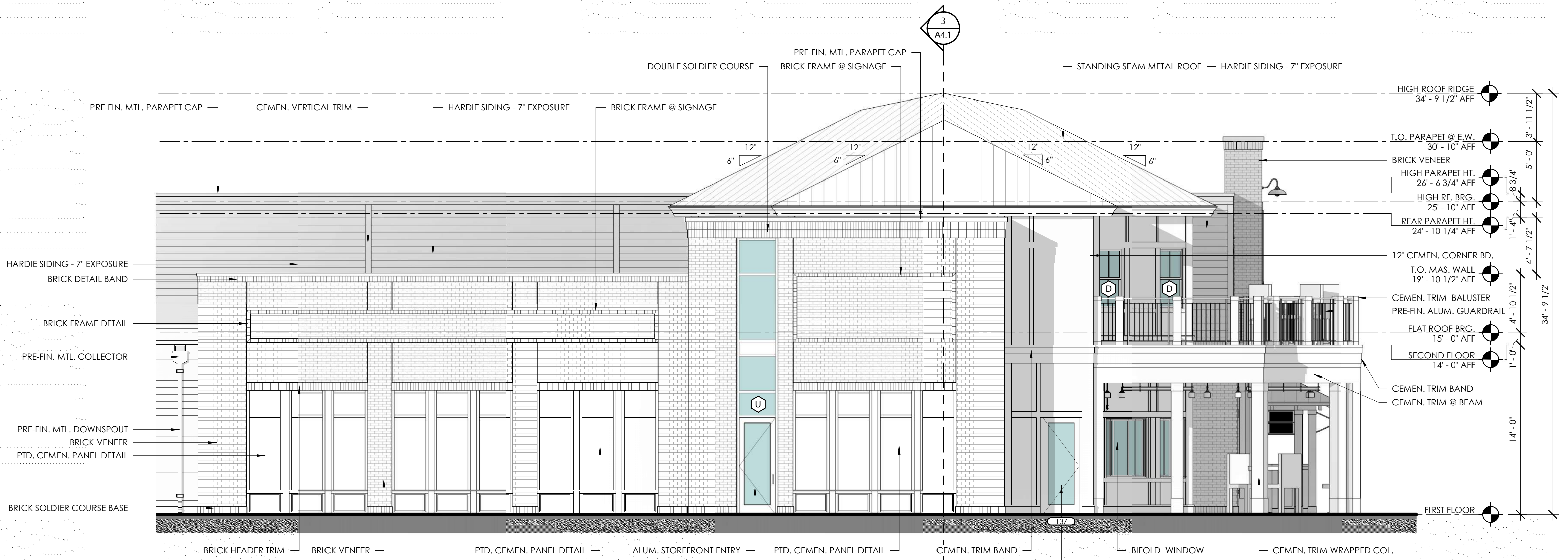




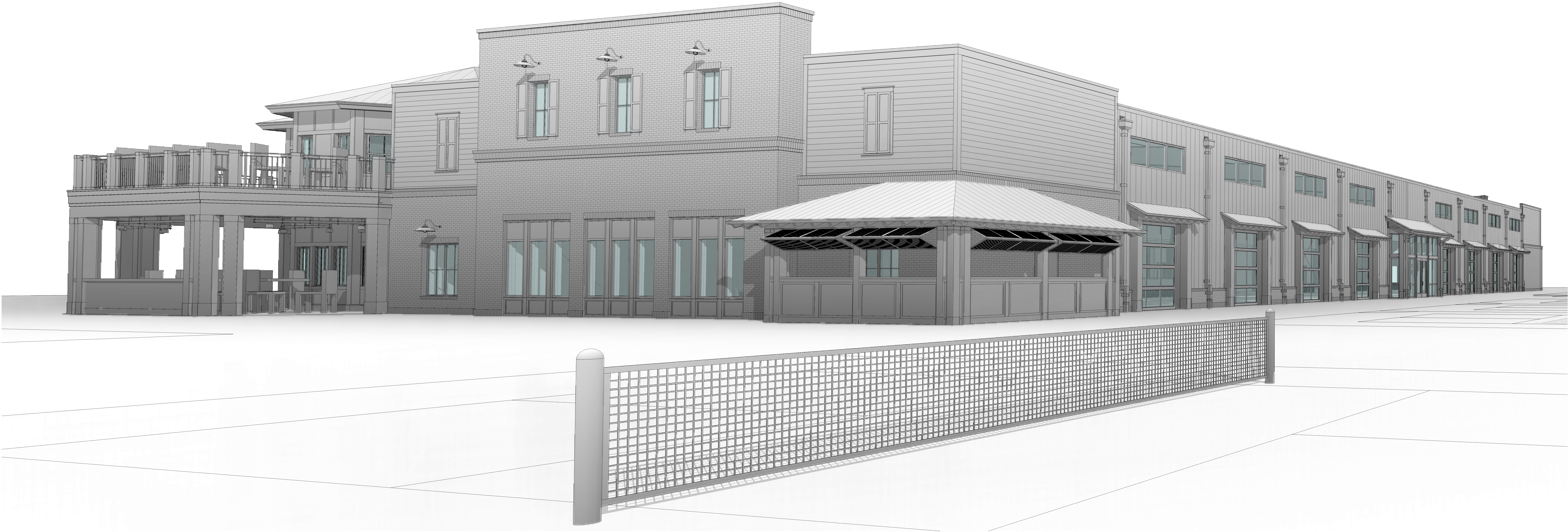
1 FRONT EXTERIOR ELEVATION - COMPOSITE
A3.0 3/32" = 1'-0"



2 FRONT EXTERIOR ELEVATION - COMPOSITE - LEFT
A3.0 3/16" = 1'-0"



3 FRONT EXTERIOR ELEVATION - COMPOSITE - RIGHT
A3.0 3/16" = 1'-0"



① 3D VIEW @ CHAMPIONSHIP COURT

LOWCOUNTRY PICKLEBALL CLUB
50 ESTATE DRIVE - BLUFFTON, SOUTH CAROLINA 29910

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PROJECT INFO

Date	2023.03.29
Project No.	21-111

ISSUE

NO.	REV.	DATE	DESCRIPTION
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SHEET TITLE

RENDERED
ELEVATIONS

RE1.1

PROJECT INFO

Date	2023.03.29
Project No.	21-111

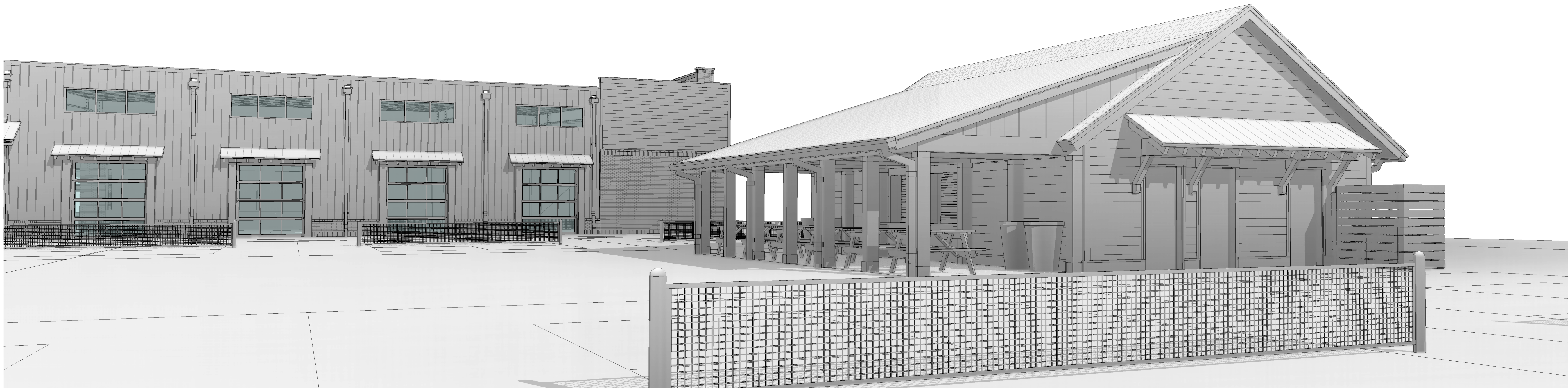
ISSUE

NO.	REV.	DATE	DESCRIPTION
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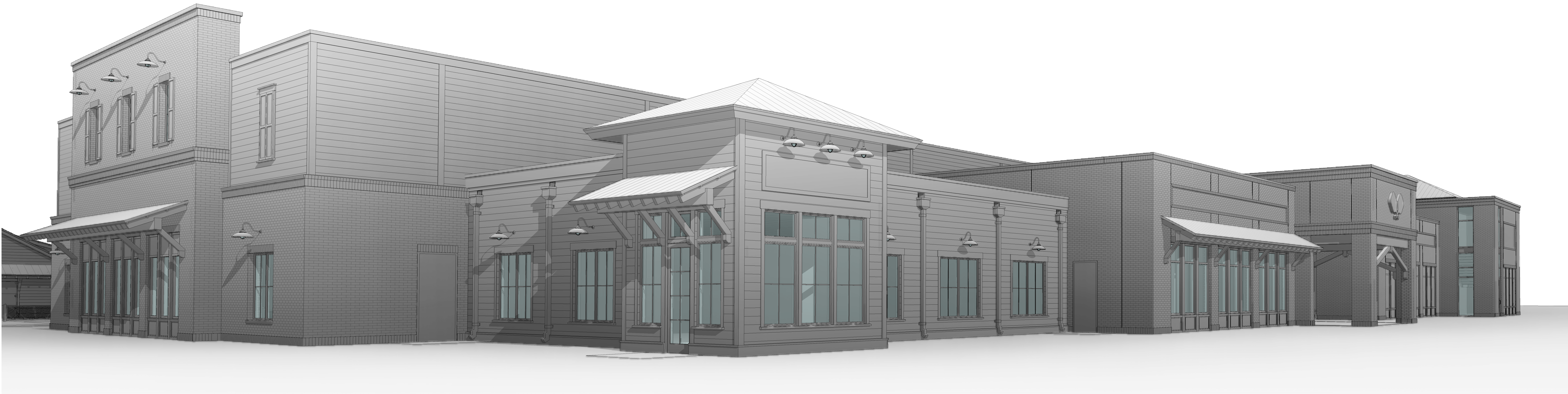
SHEET TITLE

RENDERED
ELEVATIONS

RE1.2



1 3D VIEW @ MAIN CORRIDOR



2 3D VIEW @ MAIN CORRIDOR - ENLARGED

STATE OF SOUTH CAROLINA)
)
COUNTY OF BEAUFORT)

THIS AGREEMENT dated the ____ day of _____ 2024, is between the Town of Bluffton, S.C., a municipal corporation with offices at 20 Bridge Street, SC 29910 ("Town"), and Palmetto Land Associates, LLC, ("Developer") a South Carolina limited liability corporation located at _____.

BACKGROUND STATEMENT

One of the primary missions of the Town is to encourage economic development and thereby improve the tax base and enhance the livability of the Bluffton area.

In September 12, 2023, the Bluffton Town Council adopted an Ordinance (“the Ordinance”) establishing an economic development incentive plan. The Ordinance was codified as Article VI within Chapter 6 – Businesses and Business Regulations, and is incorporated herein by reference.

The Developer has acquired commercial property located at the east side of Okatie Highway between Gibbet Road and Highland Crossing Drive; the property is within the Town limits and within the Incentive Area identified in the Ordinance.

The Developer has requested an economic incentive grant from the Town in return for the Developer's agreement to develop commercial space in Town and locate approximately eleven thousand eight hundred (11,800) square feet of medical and healthcare use office space.

Revenues from business licenses, stormwater fees, building permits and property taxes are estimated to exceed \$119,000 in a five-year period. There is also an estimate that the development will create an additional one hundred thirty four (134) jobs of which forty two (42) will be in the medical / health care industry.

Based upon the foregoing, the Town Council of the Town of Bluffton has determined that the mission of the Town to encourage economic development will be enhanced by the completion of the Developer's project.

STATEMENT OF AGREEMENT

1. In consideration of the mutual representations, warranties, covenants and agreements contained herein, the parties hereto agree as follows:
2. The Developer will designate 11,800 square feet of commercial space dedicated for the operation of medical and healthcare uses. The Developer will establish an operation in the Town on or before September 30, 2027 that complies with the definition of health care as referenced in the Ordinance. If the Developer cannot find suitable business occupants

in the health care industry, he must inform the Town in writing of his intent to expand the search, and all potential business occupants must fall within the uses identified in the Ordinance, Section 6-145(a)(5) or the grant award may be amended in accordance with the Ordinance, Section 6-146(c)(3).

3. The Town will pay the Developer a grant based on the increase in fees and business licenses. The grant will be provided over a five-year period on the 1st of the month in which the business opens and on such date each subsequent year, contingent upon a certificate of occupancy being issued. The grants will be percentage based on the increase in values over the bases established for each of the below categories for the following percentages.

	Year 1	Year 2	Year 3	Year 4	Year 5
Permit Fees	50%	-	-	-	-
BJWSA	100%				
Business License	50%	50%	50%	50%	50%

The Business License amount will be set based on the amount paid at the time of issuing their building permit and subsequently on their paid renewal application amount that covers an entire twelve-month operation period. The permit fees will be based on the fees paid for work done prior to the Certificate of Occupancy and initial Business License of any tenants being issued.

4. The total amount of the grant shall not be greater than the direct value received by the Town and delivered from the capital investment during the contribution period.
5. The benchmarks, measures and reporting for this Agreement shall be:

Benchmark	Measure	Reporting
Target industries	Healthcare, and or medical; in the alternative, provide notice of expansion to all target industries in the Ordinance	Provision of tenant's business license with the Town of Bluffton.
Total project investment	\$25,000,000 of which \$4,000,000 for medial and healthcare space.	Budget spreadsheet with accompanying invoices and proof of payment.
Property valuation		

6. Notifications shall be addressed:

- a) To Developer:
Rick Maggin
Palmetto Land Associates, LLC
- b) To Town:
Town Manager
Town of Bluffton

20 Bridge Street
Bluffton, SC 29910

7. The Background Statement above is included in the terms of this agreement. The terms and conditions of the Ordinance are incorporated by reference.

IT IS SO AGREED as of the date above first written.

Palmetto Land Associates, LLC

Town of Bluffton, South Carolina

By:_____

By:_____

Its:_____

Its:_____

Attachment 6

Recommended Motion

Consideration of An Ordinance Authorizing an Economic Development Incentive Agreement between the Town of Bluffton and Palmetto Land Associates, LLC in Support of the Development of 11,800 square feet of Medical and Healthcare Facility Space – David Nelems, DRCI CEO

“I make a motion to approve second and final reading of an Ordinance Authorizing an Economic Development Grant Incentive Agreement between the Town of Bluffton and Palmetto Land Associates, LLC.”



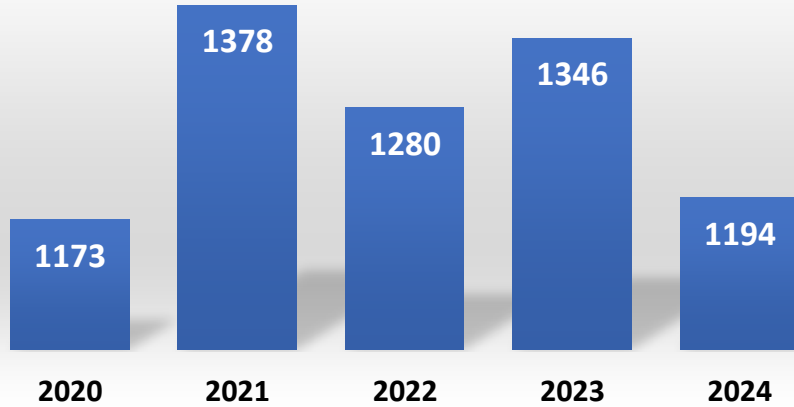
STATISTICAL INFORMATION

BLUFFTON POLICE DEPARTMENT

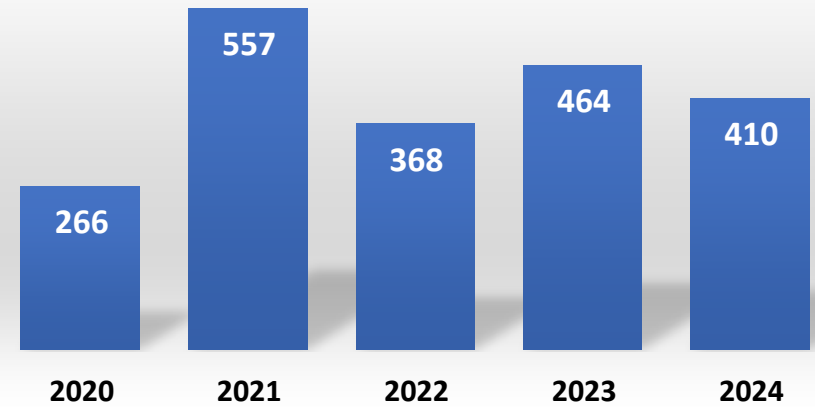
May 31, 2024

Presented by Chief Joseph Babkiewicz

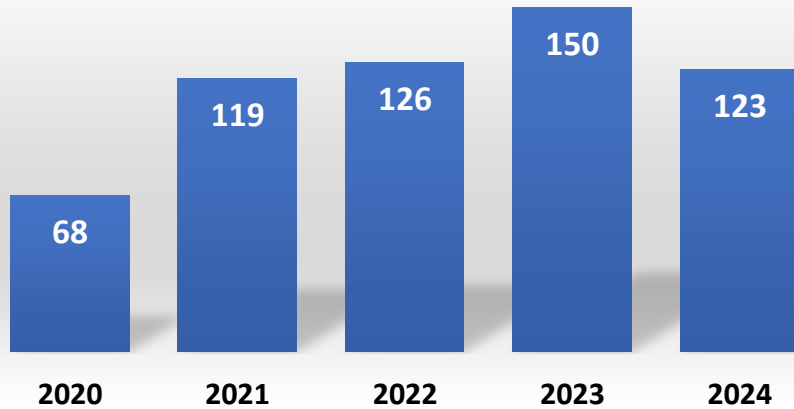
May Calls for Service Comparison



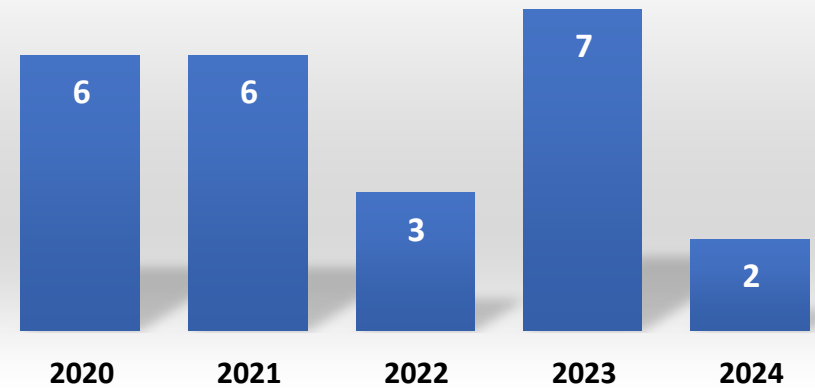
May Traffic Citation Comparison



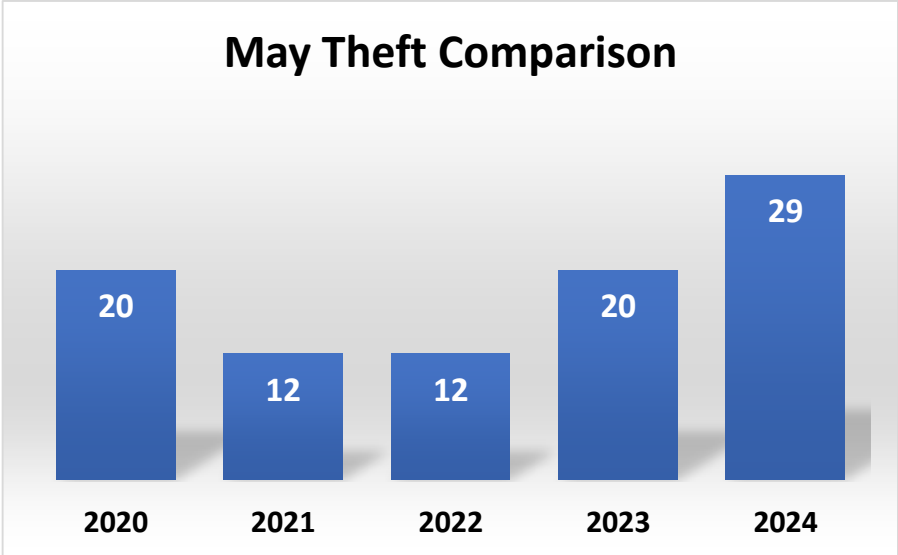
May Collision Comparison



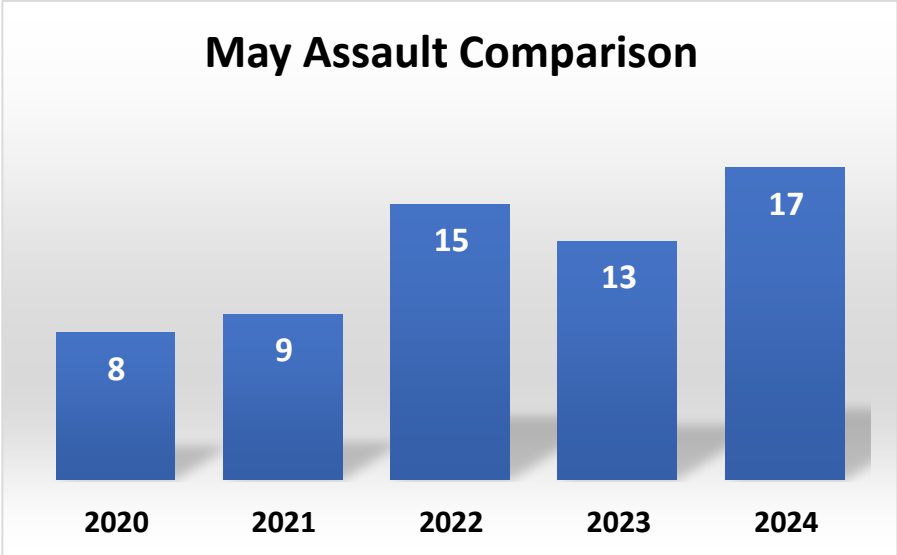
May Burglary Comparison



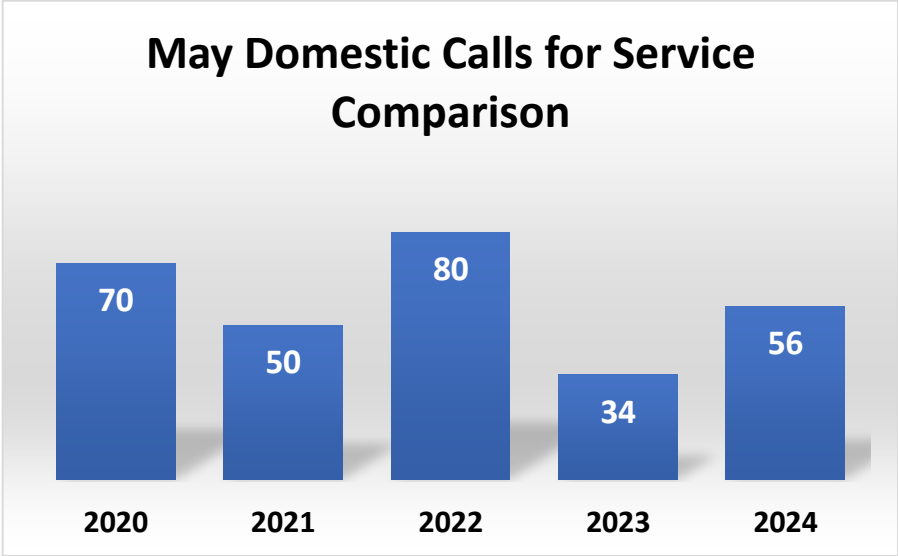
May Theft Comparison



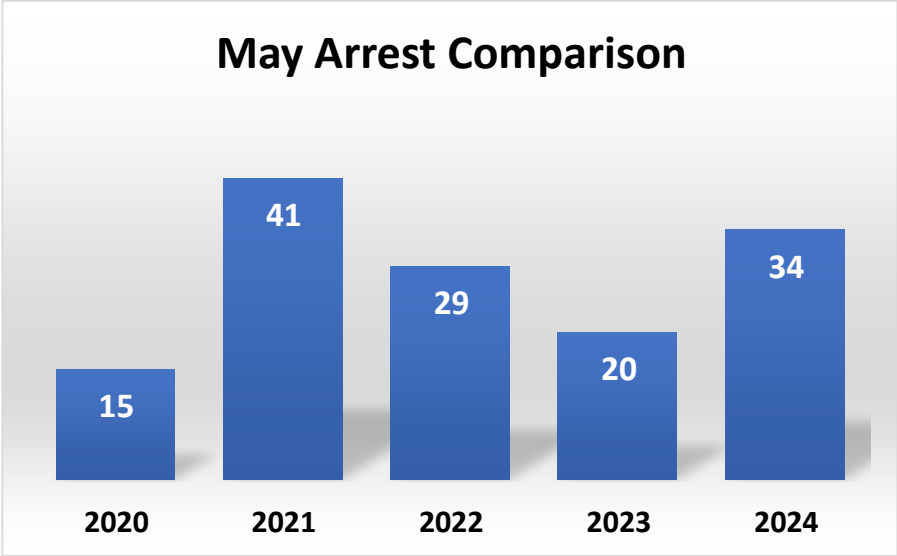
May Assault Comparison



May Domestic Calls for Service Comparison



May Arrest Comparison

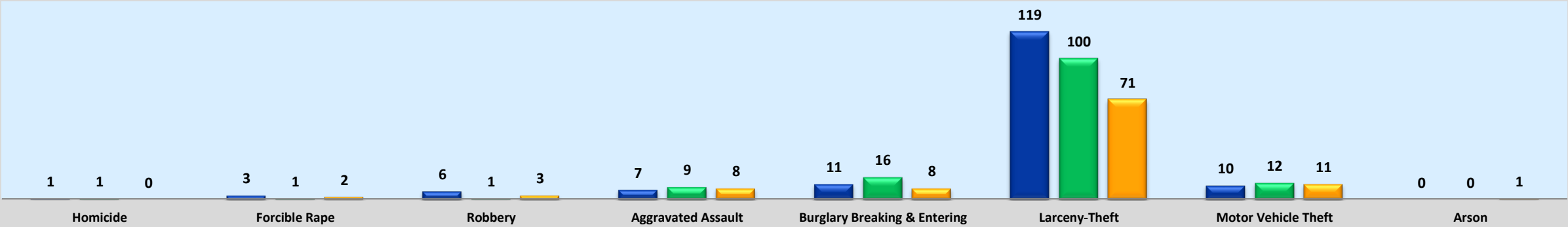


DEPARTMENT HIGHLIGHTS

Year-to-Date
May

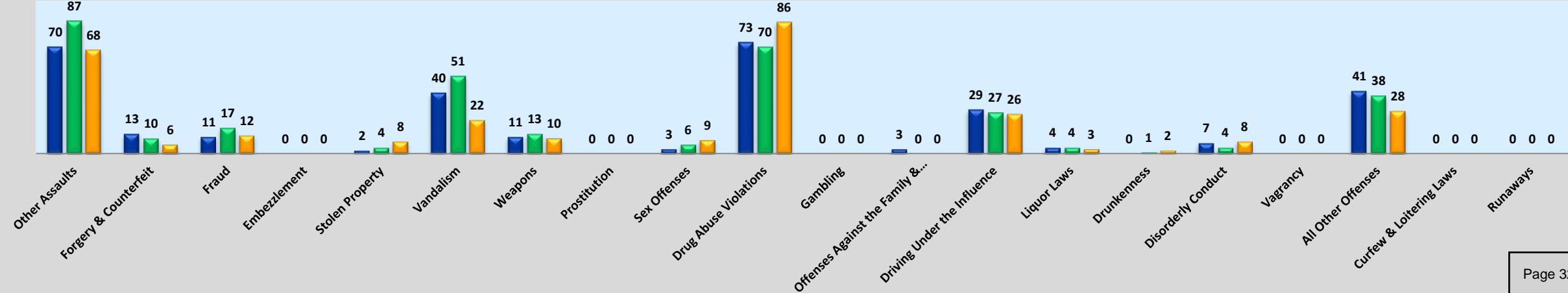
Part I Crimes

2024 2023 2022

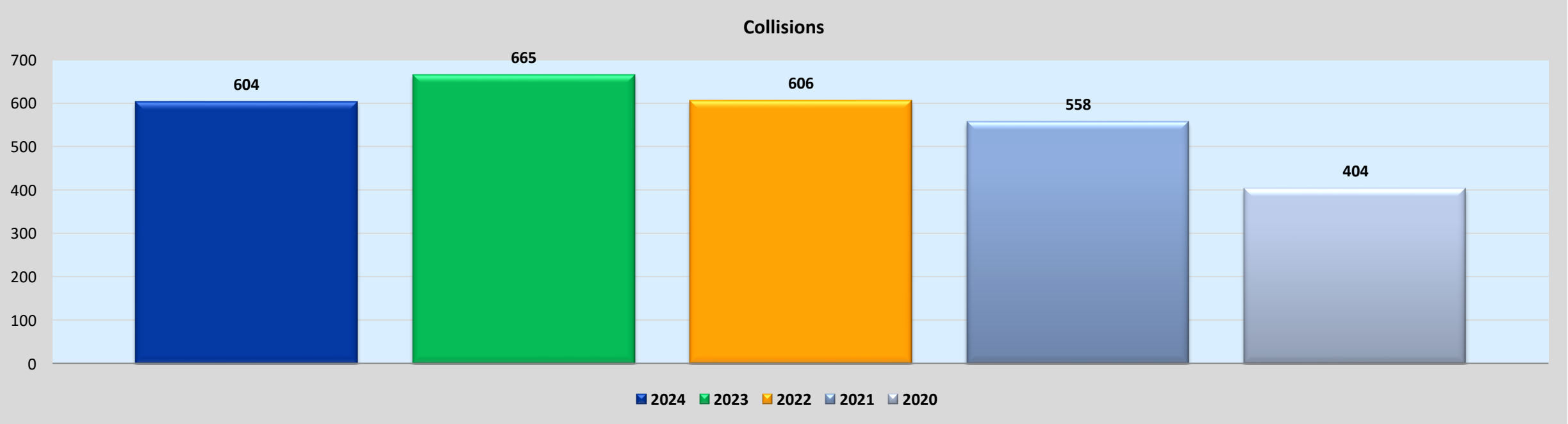


Part II Crimes

2024 2023 2022



Year-to-Date
May



Law Enforcement Advisory Committee

- Meeting cancelled due to lack of quorum.

Meetings Attended by Chief Joseph Babkiewicz

Every Wednesday – Senior Staff Communications Meeting

Every Wednesday – Commanders Meeting

Every Friday – Men's Meeting @ Bible Missionary Baptist Church

May 1st – Meeting with Citizen

May 1st – Zoom Meeting with CPSM

May 1st – Attend Traffic Calming Meeting @ Town Hall

May 1st – Attend Hampton Hall meeting

May 1st – Meeting with Finance Director

May 2nd – Meeting with Citizen

May 2nd – Meeting with Council Member E. Burden

May 4th – Attend Annual May River Cleanup Event

May 4th – Attend Entrepreneur Day for Kids Event @ Oscar Frazier Park

May 8th – Meeting with Citizen

May 8th – Attend Explorers Class

May 9th – Attend 2024 Employee Appreciation Event

May 9th – Command Staff meeting

May 10th – Meeting with Corporal

May 10th – Attend BC School District Annual Community Partners Safe Schools Luncheon

May 10th – Visit to Blume @ Belfair for Mothers Day celebration

May 11th – Attend Mayfest Festival

May 13th – Meeting with Police Applicant

May 13th – LowCountry Retired Officers Assoc Appreciation Lunch @ LEC

Meetings Attended by Chief Joseph Babkiewicz cont.

- May 14th** – Attend TemperaturePro Grand Opening/Ribbon Cutting Ceremony
- May 14th** – Command Staff meeting
- May 14th** – Attend Town Council meeting
- May 15th** – Attend May Birthdays and Anniversaries Celebration
- May 15th** – Corporals Meeting
- May 15th** – Sergeants Meeting
- May 16th** – Attend EE Zero LLC Grand Opening/Ribbon Cutting Ceremony
- May 17th** – Attend Retirement Party @ Rotary Community Center
- May 17th** – Attend Budget Workshop
- May 17th** – Meeting with St. Josephs Candler representative
- May 20th** – Attend Hampton Hall Wounded Heroes Charity Golf Event
- May 20th** – Meeting with Finance Director and Payroll
- May 21st** – Attend Mayor Service Awards
- May 22nd** – Attend Leadership Training
- May 22nd** – Mental Health Advocate Interview
- May 22nd** – Meeting with Town Manager
- May 23rd** – Mental Health Advocate Interviews
- May 24th** – Attend SC Criminal Justice Academy Graduation
- May 28th** – Meeting with Mayor and Town Manager
- May 28th** – Meeting with Citizen
- May 28th** – Meeting with Corporal
- May 28th** – Attend MC Riley for Coastal Kingdom Presentation
- May 28th** – Attend Hurricane Preparedness Meeting

Meetings Attended by Chief Joseph Babkiewicz cont.

May 29th – Town-Wide Hurricane Preparedness Meeting

May 29th - Meeting with IT Director

May 29th – Attend Disability Caravan Bus Ribbon Cutting Ceremony

May 30th – Attend New River Linear Trail Groundbreaking Ceremony

May 30th – Attend Budget Workshop

Commendations -	May 5 th – Thank you email from First Citizens Bank – Officer Lindiakos, Corporal Laccesaglia and Officer Young.
Complaints -	None

Police Department Demographics as of May 31, 2024

DEPARTMENT	Black	Hispanic	Other	White	Grand Total
Female	1	4	1	18	24
Male	5	5	3	33	46
Grand Total	6	9	4	51	70

SWORN OFFICERS	Black	Hispanic	Other	White	Grand Total
Female	1	1		10	12
Male	5	5	3	30	43
Grand Total	6	6	3	40	55

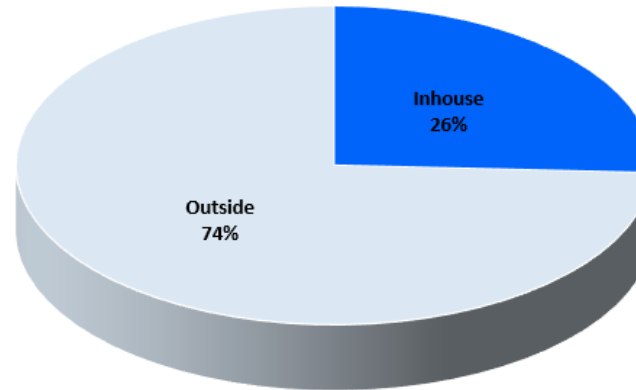
May Officer Training

Inhouse

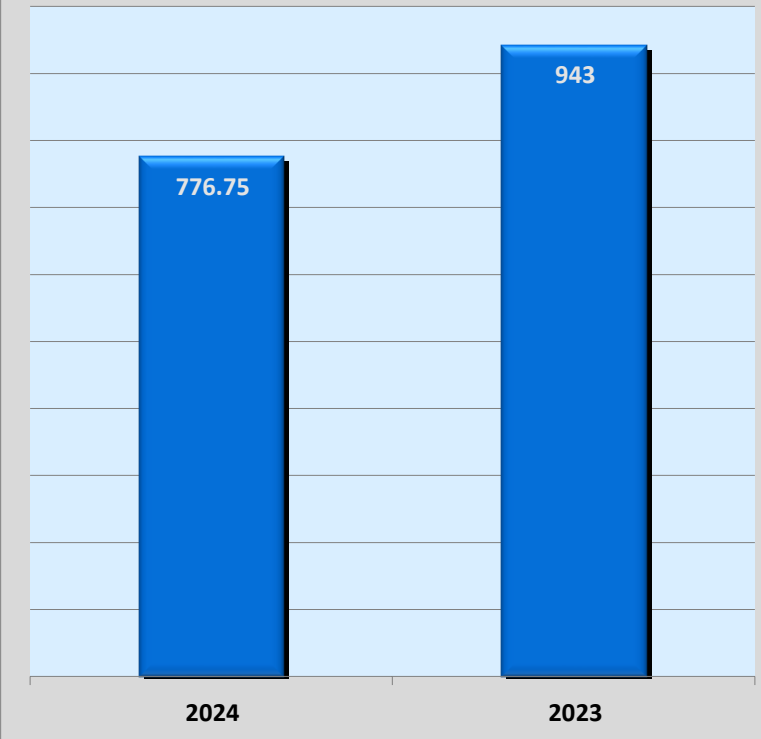
Hazmat First Responder Awareness (FRA) Level 1 - 6 Officers
 Bloodborne Pathogens for First Responders - 5 Officers
 Pre-Academy Training - 1 Officer
 Anti-Bias Training for Law Enforcement - 1 Officer
 Line-Up 2024 May-June - 15 Officers
 Alzheimer's & Dementia Law Enforcement Training - 9 Officers
 Line-Up 2022 July-August - 1 Officer
 Line-Up 2022 May-June - 1 Officer
 Line-Up 2022 November-December - 1 Officer
 Line-Up 2022 September - October - 1 Officer
 Mental Illness: Practical App of Mental Health for First Responders - 1 Officer

Outside

Traffic Collision Investigation Recon Phase 3 - 1 Officer
 SCCJA Basic Law Enforcement - 2 Recruits
 Guest Instructor / Firearms Recertification - 1 Officer
 CSI and Forensic Investigation +Photography - 3 Officers
 FBI LEEDA - 2 Officers
 SCLEAP Conference - 1 Officer
 Field Search Software Confiscation - 1 Officer

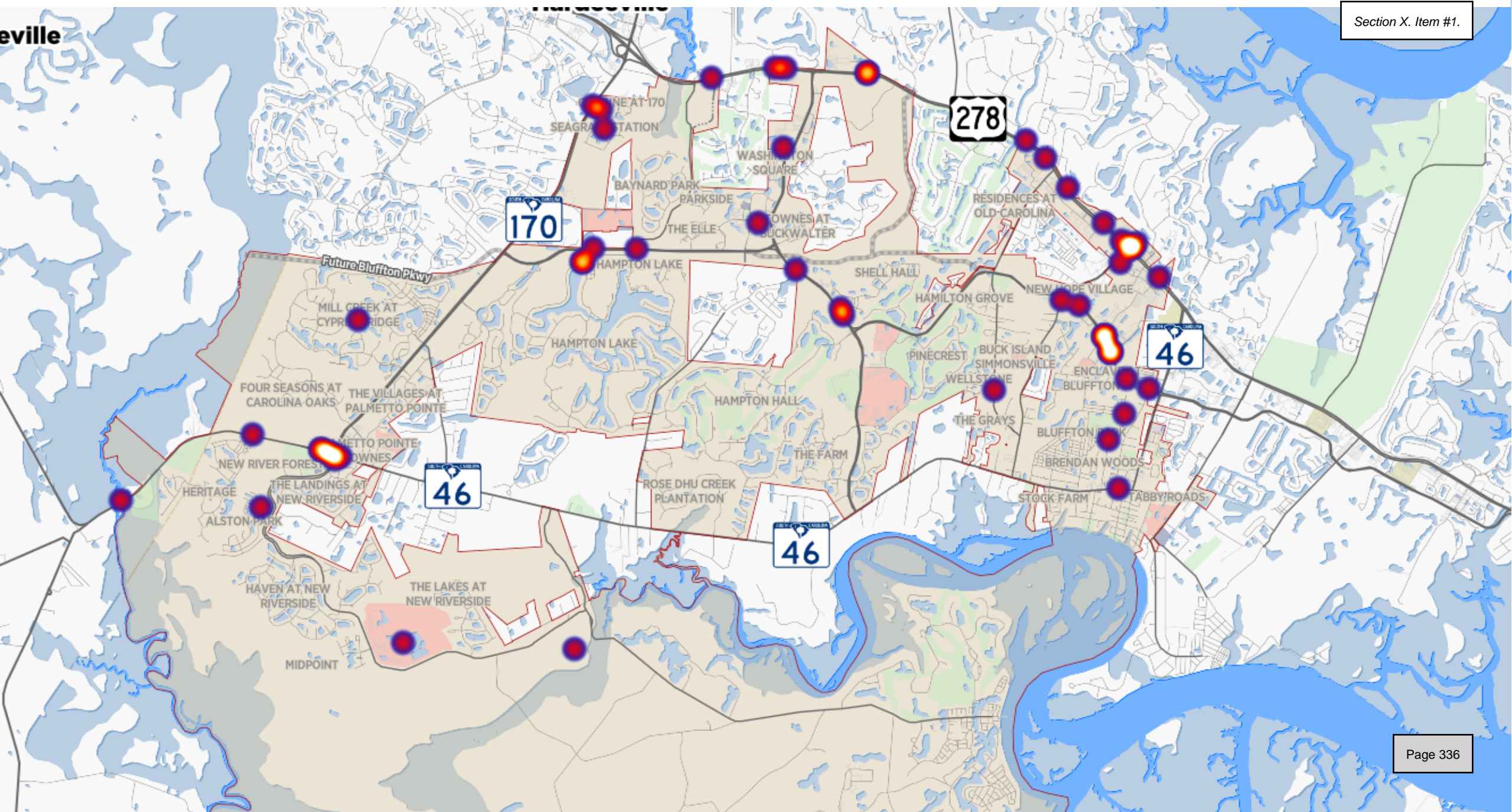


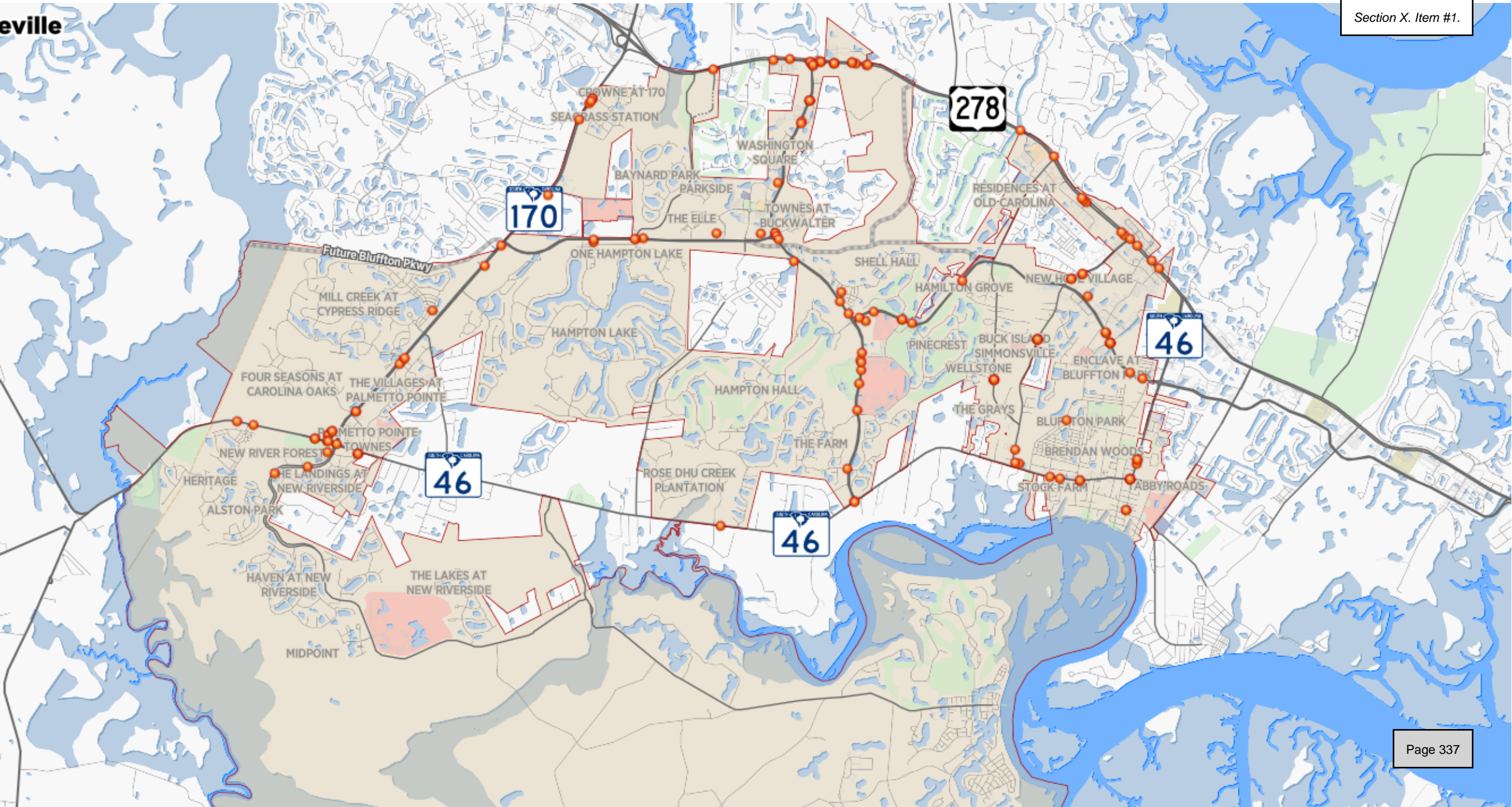
May 2024 / 2023 Training Hours Comparison

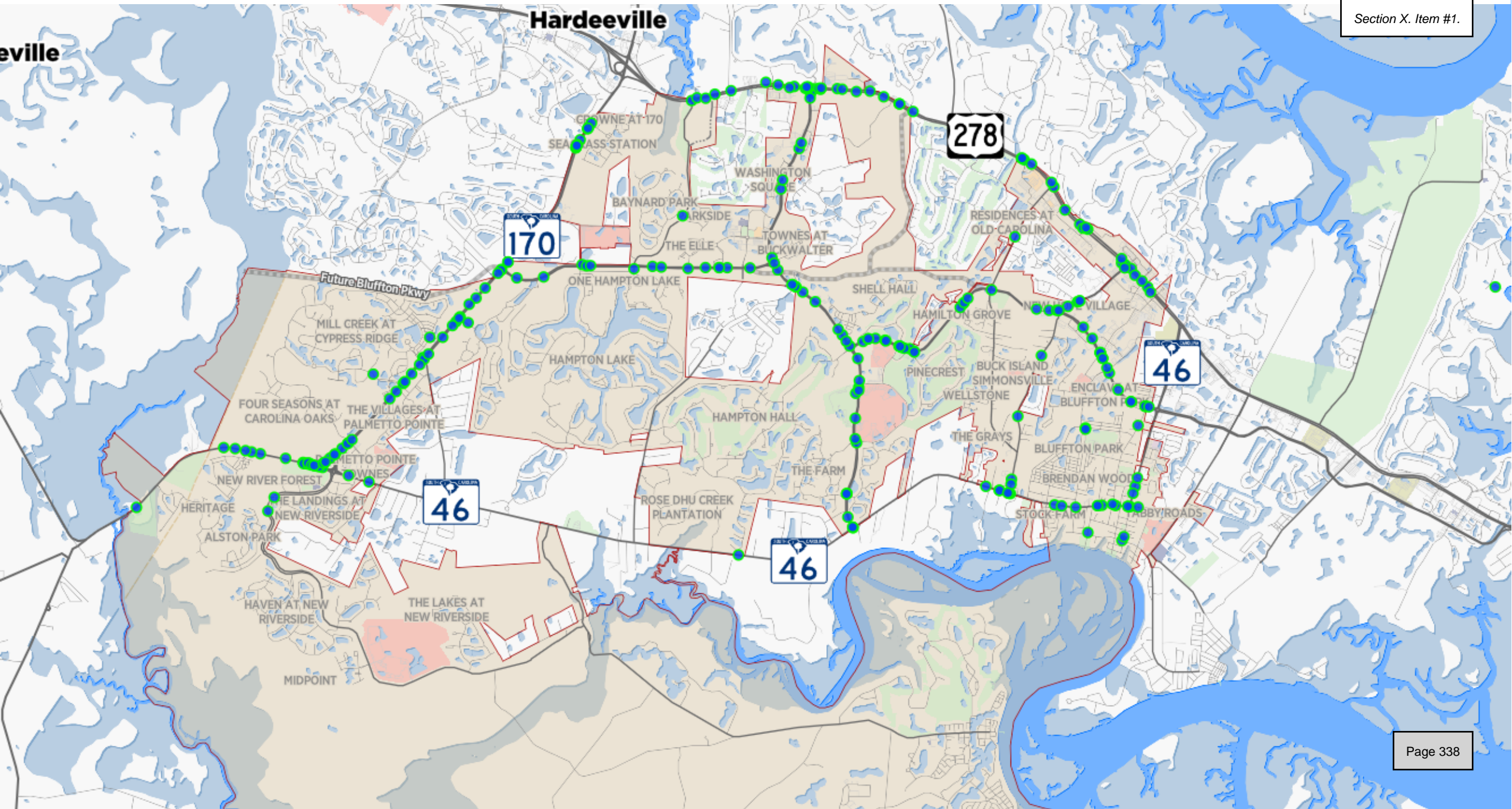


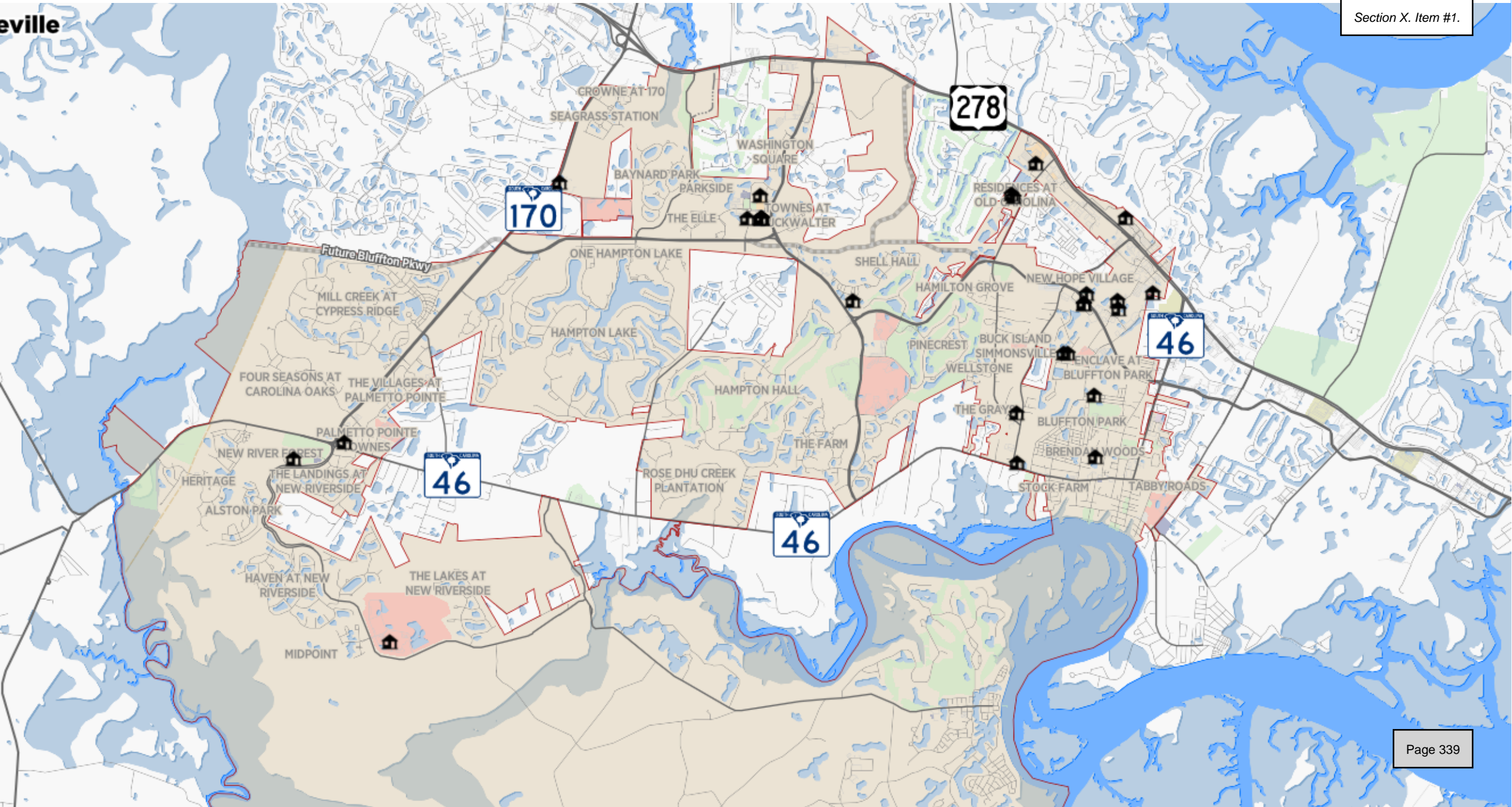
COLLISIONS (73) May 2024

Section X. Item #1.



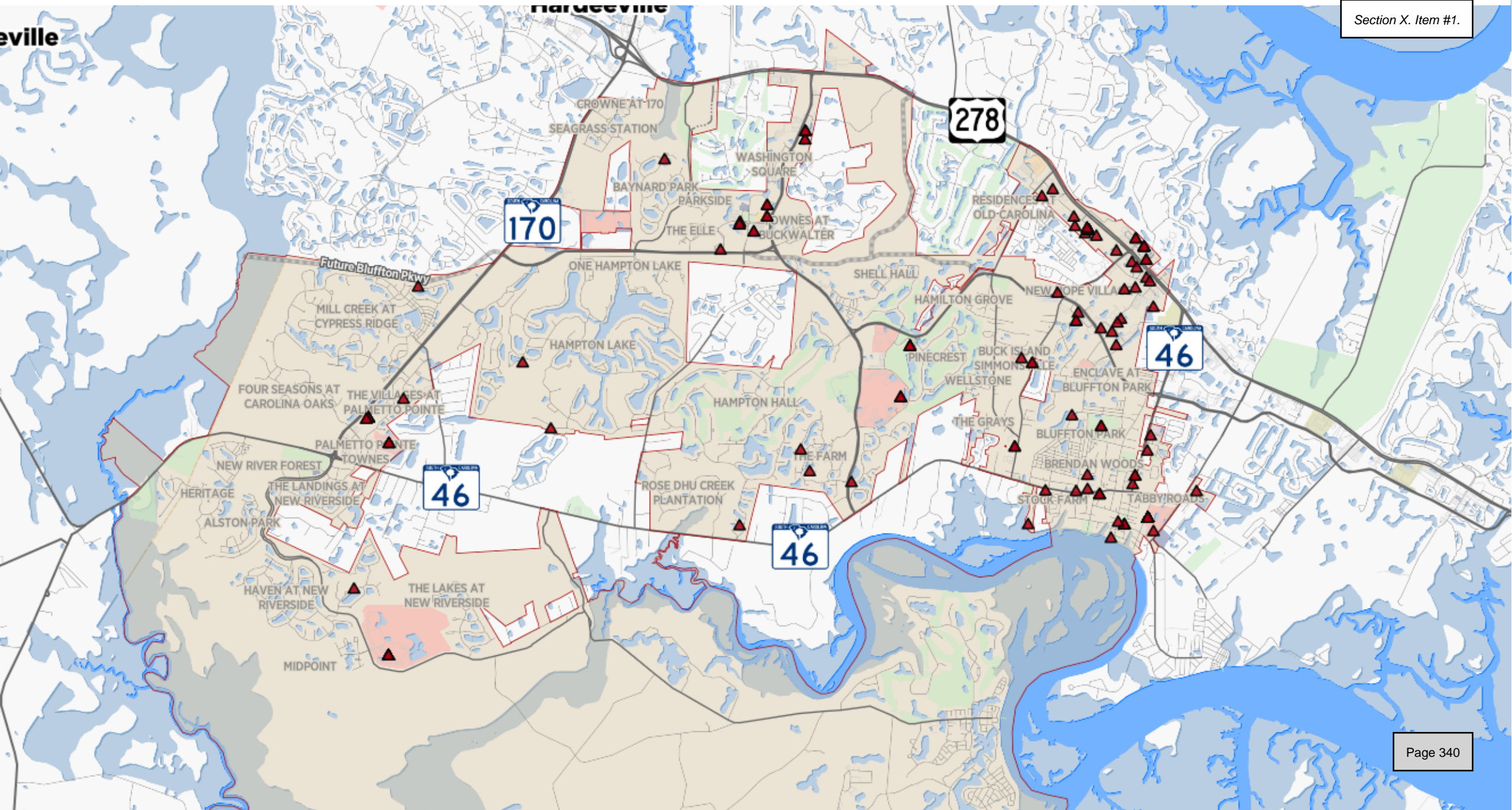






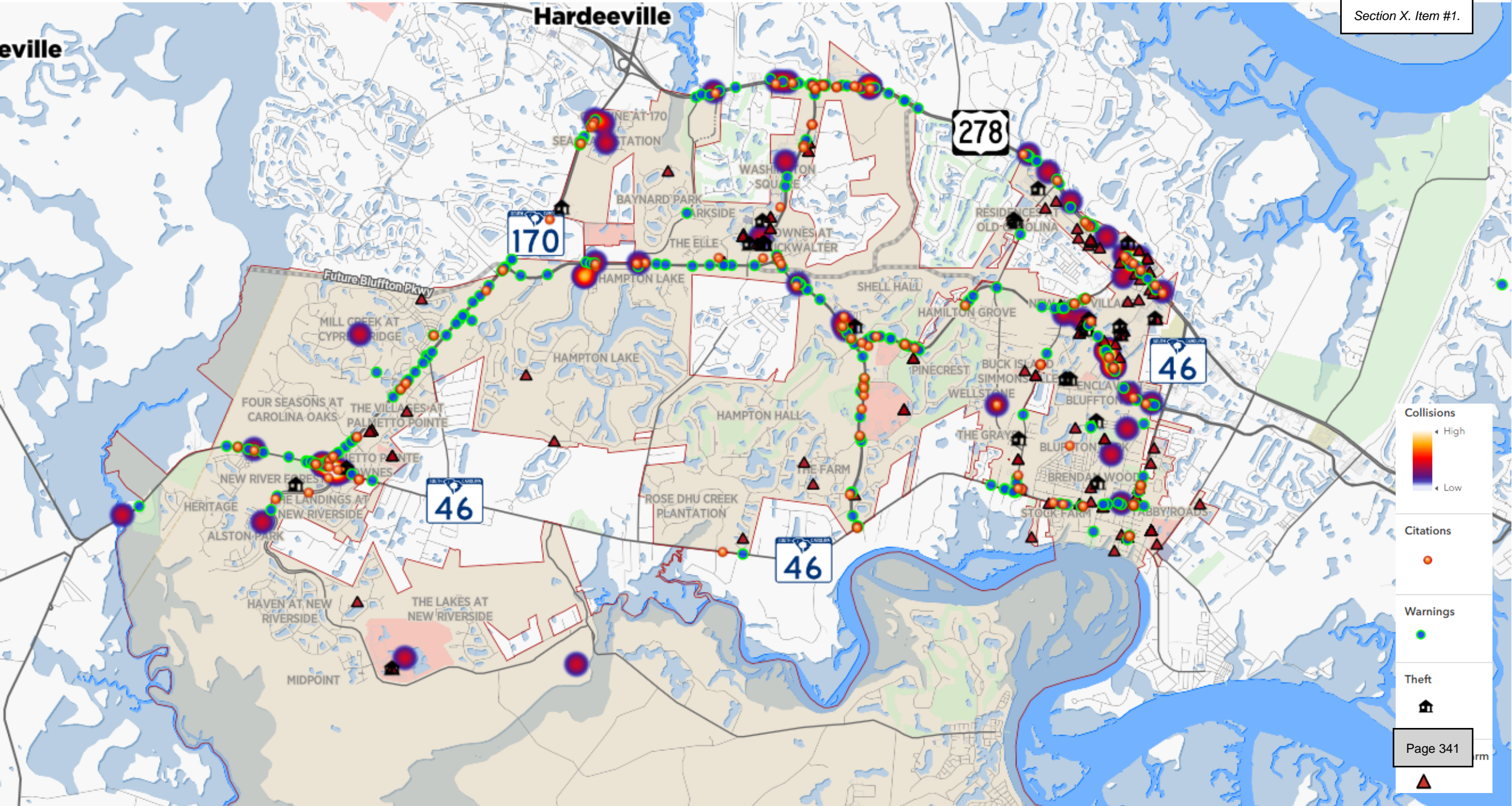
#1 CALL TYPE – Activated Alarms (142) May 2024

Section X. Item #1.



COLLISIONS, CITATIONS, WARNINGS, THEFTS AND ACTIVATED ALARMS – May 2024

Section X. Item #1.



CALLS FOR SERVICE TOP 10 CALL TYPES	
Case Follow Up	153
Activated Alarm	142
911 Hang-Up	103
Disturbance	92
Accident	83
Reckless Driving	49
Domestic	48
Misc Call	36
Health Welfare	29
Noise Complaint	27

TOTAL CALLS FOR SERVICE: 1194

AVERAGE PER DAY: 43

PRO-ACTIVE PATROL	
Extra Patrol - Business	878
Traffic Stop	339
Extra Patrol - Residence	181
Traffic Enforcement	4

UNIFORM TRAFFIC CITATIONS TOP 10 VIOLATIONS	
Driving without a License	25
Operating Vehicle While License/Registration Expired	23
Driving Under Suspension	16
Failure to Maintain Proof of Insurance	13
Possession of 28g (1 oz) or less of Marijuana	9
Failure to Return License	8
Driving Under the Influence	7
Speeding 15 mph - 24 mph over the speed limit	6
Open Container of Beer or Wine	4
Speeding more than 24 mph over the speed limit	4

TOTAL CITATIONS ISSUED: 142

AVERAGE PER DAY: 5

UNIFORM TRAFFIC WARNINGS TOP 10 VIOLATIONS	
Defective Equipment	83
Speeding	62
Vehicle License Violation	22
Improper Lane Use	17
Speeding & more	15
Other	10
Changing Lanes Unlawfully	9
Disregarding Stop Sign	7
Disregarding Traffic Signal	6
Improper Lights	5

TOTAL WARNINGS ISSUED: 261

AVERAGE PER DAY: 9

CRIMINAL INVESTIGATIONS	
Cases Assigned	30
Incident Reports	4
Supplemental Reports	44
Cases Closed	35
Arrests Made	0
Arrest Warrants	3
Bond Court	5
Case Call Outs	7
Search Warrants	10

Case Call Outs:

1. 24BP12060 – Gunshot wound.
2. 24BP13096 – Death Scene
3. 24BP13391 – Kidnapping
4. 24BP12006 – Armed Robbery
5. 24BP13736 - Burglary

Bond Court:

1. 24BP13391 – Kidnapping/FTS for blue lights/PDC/Possession of a Weapon during Violent Crime
2. 24BP13706 – Domestic Violence 3rd Degree
3. 24BP10643 – Unlawful conduct towards child
4. 24BP11643 – DV High and Aggravated
5. 24BP12672 – Domestic Violence 3rd Degree

Mental Health Advocate:

- 0 – Calls for Service
- 5 – Referrals
- 14 – Follow Ups
- 6 – Supplemental Reports

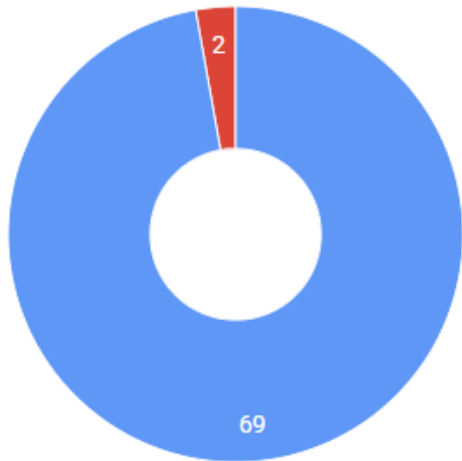
Victim Advocate:

- 1 – Case Call Out
- 3 – Incident Report
- 10 – Case Closed
- 3 – Bond Court
- 12 – Supplemental Reports

COMMUNITY SERVICE ASSISTANTS

Section X. Item #1.

Tickets By Status Month To Date

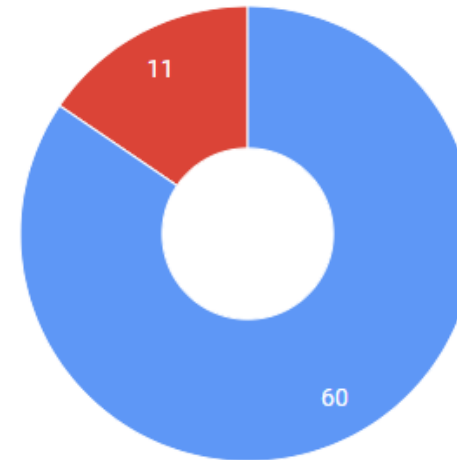


- Warning
- Issued

Total Count: 71

As of 5/28/2024, 12:00:00 AM

Tickets By Officer Month To Date

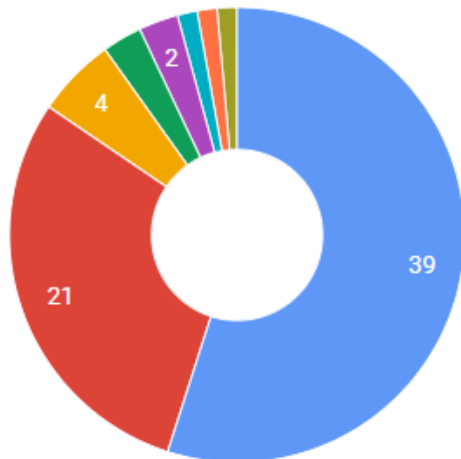


- Pamela Okeefe-Racanello
- Sunny Rogers

Total Count: 71

As of 5/28/2024, 12:00:00 AM

Tickets By Location Month To Date

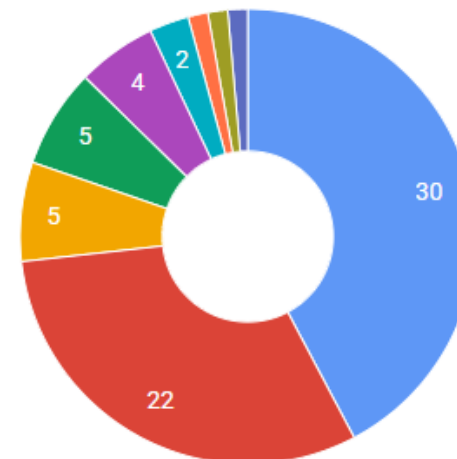


- CALHOUN ST
- BLUFFTON RD
- BRIDGE ST
- LAWTON ST
- BOUNDARY RD
- GOETHE RD
- GREEN ST
- LAWRENCE ST

Total Count: 71

As of 5/28/2024, 12:00:00 AM

Tickets By Violation Month To Date



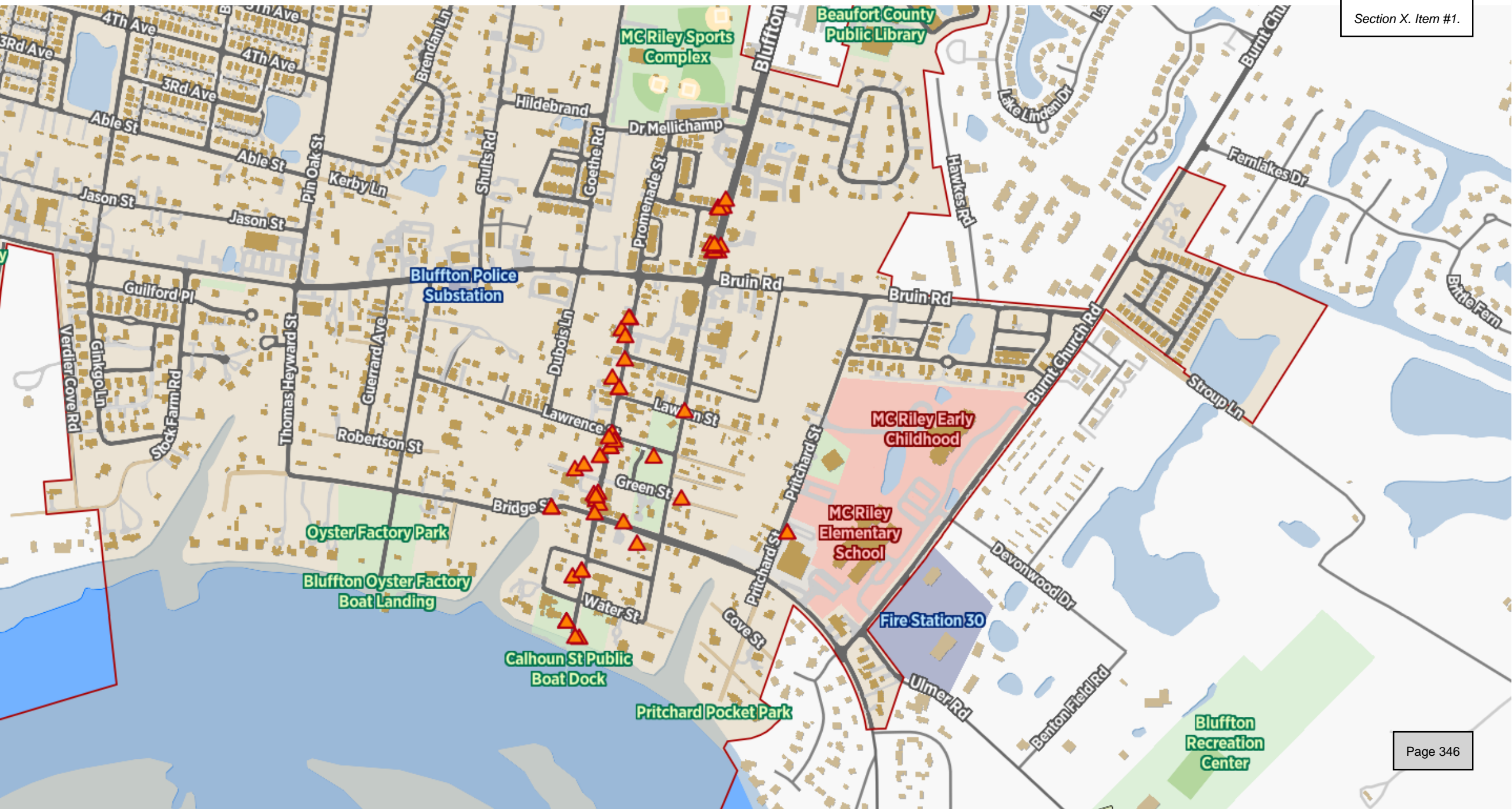
- Parking on a Sidewalk
- Parking within a safety zone
- Wrong Side of St. / Facing Traffic or 18" or more Away from Curb
- Official Sign Prohibits
- Double Parked
- Blocking Roadway or Alley
- Blocking Public or Private Driveway
- Parking on a Crosswalk
- Safety Hazards

Total Count: 71

As of 5/28/2024, 12:00:00 AM

DOWNTOWN CITATIONS (71) – May 2024

Section X. Item #1.



Code Enforcement:

William Bonhag

Signs

- Multiple Business advertisement signs removed from Old Town and various locations throughout Bluffton.

Expired Business License, Notice of Violations

- Letter(s) sent via certified to businesses operating with expired business license.
- 1/8/24 2 tickets were issued to Justin Meister of Streamline Moving and Cleaning for operating w/o a business license and placement of signs (approximately 30+) around the town. The court matter is scheduled for 1/23/24 at 9am. 7/30/24 Jury selection for April Trial.
- 5/1/24 NOV issued to Coastal Waste and Recycling in Palmetto Bluff; license actions need to occur to become compliant. Actions taken for BL.
- Hampton Pkwy storage containers on site complaint, Building Safety says ok due to property ongoing work.

Complaints / Property Checks / Follow-ups / Ordinance Letters

- Russo's Seafood, trash smell, due to freezer down and an abundance of fish dumped into commercial dumpster. The following day cleaned up.
- 1238 May River Rd letters to clean up location, status is completed.
- 1236 & 1238 May River Road, working with this group as they are cleaning up these locations that have been longtime neglected. Status ongoing progress.
- 19 Shults visited due to Rooster complaint, appears quiet for now.
- 160 Simmonsville, 158 & 156 Building Safety as we have several violations for this location. This is a Frazier property with occupants failing to leave is our understanding. Codes Team along with PD to visit soon.
- Kobe Steakhouse blocking sidewalk with lighthouse lights display, blocking handicap walkway, owner moved immediately as new owners.
- 216 Simmonsville road properties to be visited by the Team due to commercial business operation ongoing in a residential zone

Code Enforcement continued:**218 Buck Island Rd./ owner John Flood**

- August 7, 2023 was another 30 days given deadline for clean-up of property and removal of all RV occupants in accordance with town codes. (non-compliant)
- The property is in the process to be sold by 6/1/24 to Norberto Angeles.
- All motor vehicles are off property.
- Mr. Todd is no longer residing on site.
- The new owner once purchased has an extended 60 days to remove all items and clean-up property.

75 Goethe Road

- Residents complained about this location's abundance of tires, vehicles not registered on location and needs to be cleaned-up. Spoke to son Jonathan as he advised me that he will clean up this location. Indicated he is having his tire machines fixed to open back up his tire business, unfortunately, he does not fully comprehend that this area is zoned residential only and the town will not issue a license for this place. Vehicles covered at this time; scattered tires are being addressed.
- This will be placed on a must visit with Codes Team and PD; they have no business license; this is also a residential zone, and all commercial containers need to be removed.

131 Goethe Road

- Claudia Gomez Aguilar was issued letters pertaining to her blatant display of party chairs, tables, along with a possible construction business operating from this location. Tried to open communication with a male subject in the driveway in a work truck, advised him everything needs to be removed and cleaned up.
- Will be re visiting to deliver NOV as operating w/o a BL from this location, which is zoned Residential Only area.
- Pending issuance of summons when owner available at home.

241 Buck Island

- Re visiting location due to commercial equipment returned to site.
- Pending removal of equipment and RV in rear section. NOV issued, monitor for compliance.

Code Enforcement continued:

331 Buck Island

- 6/7/23 property was visited by Codes, Lt. Ferrelli, Jordan Holloway, and Bill Baugher.
- 6/14/23 notified via email 252 Simmonsville flooding due to Ruiz Concrete action of backfilling a pond.
- 6/21/23 meeting with Jordan, myself, and Bill Baugher to discuss all violations. Jordan working on letter draft to be sent to owner of 331 Buck Island to include vehicle removals, RV disconnection, no permits obtained for housing, Residential Zoned Area, no construction yard allowed.
- As of 1/1/24 Mr. Ruiz with his attorney agreed to remove all trash, RVs, and his commercial materials from his property. Mr. Cervantes is following the watershed and codes directions at this time, will continue to monitor his location. The court matter is now set for April 2nd, 2024 as requested by his attorney. The property line matter is a civil situation.
- Mr. Cervantes appeared in Court 5/7/24 paid \$500 fine and is expected to have his commercial business and containers off site by Friday 5/24/24. Otherwise face more fines.

71 Bridge Street

- OKAN Food Truck is now in compliance with BL and mobile vending permits.

200 Simmonsville Road

- Lizette Fernandez was visited on 2/5/24 by our TEAM of Bill Baugher (watershed), me (CODES), Marcus Noe (Building Safety) and (Fire Inspector) Jason Lee due to multiple violation with outside bathroom created, 5 RV violations, multiple non licensed vehicles.
- Trees removed for expansion of property (not theirs).
- Pending a site plan that they said was surveyed. (we never received).
- 3/19/24 appearance for court and granted postponement by town attorney Joshua.
- 6/25/24 appearance for 7 tickets; 5 from Watershed and 2 from Codes.

218 Simmonsville Road

- 3/14/24 Due to several violations, this location was boarded up.
- Viewed the property from 220 Simmonsville Road noticed and took photo as backdoor board was removed for illegal entry. Violations pending.
- Vehicle on site w/o plates as of 3/25/24
- 5/15/24 second notice issued from Building Safety allocating 30 Days to repair all or demolish. 6/15/24 next step for a hearing in front of Building Board.

Code Enforcement continued:

214 Simmonsville Road

- Thursday 4/18/24 met with the owner and his daughter Jennifer Valez to discuss his letter and my notice of violations issued for NO BL and Residential Zoned section.
- Jennifer will assist her father with obtaining his BL and with removing items relating to commercial operations.
- We shall re-visit this property within a few weeks.

220 Simmonsville Road

- 3/21/24 visited location to identify violations.
- NA Carpentry LLC is running its business from this location and rents out rear section from the owner Alfredo Puga. This is not allowed due to the residential zoning.
- 3/25/24 meeting with the owner Alfredo Puga at this property today at 9:30am with Bill Baugher from Watershed due to RV violations.
- 3/25/24 Issued 2 NOV violations due to Residential General Zoning, NO RV living, and commercial business equipment needs to be moved by April 8th, 2024
- Bill Baugher watershed issued two tickets for illicit discharge from RV's.

222 Simmonsville Road

- Thursday 4/18/24 Codes Team visited this location with the assistance of Lt. Ferrelli for violation of NO BL and operating in a Residential Zone. Owners BL is in good standing and was advised to discontinue its commercial operation.
- Marcus Noe noted and discussed with the owner the Gate Violation, along with a business office shed that needs permits. This will be concluded upon re-visitation for compliance at a near future date to be determined.

59 Shults Road

- 5/9/24 Codes Team visited location due to RV living and treehouse connected to power and white pipe connected to treehouse and RV. Watershed to follow-up due to illicit discharge.
- Prior to visiting Codes inspected for loud dog and rooster now removed.

36 Grayson Circle

- 5/9/24 Team visited location due to excessive items of scrap metal, fridge, along with several garbage items.
- May 31, 2024 is the due time for compliance to clean yard and remove all items, owner agreed to comply with directions. Pending inspection 5/31/24.

Code Enforcement continued:

2155 Blakers Blvd.

- Short term rental advertising on Airbnb, no license and not allowable inside this development.
- Letters were sent to the owner in Georgia, pending response.
- Complainant is next door neighbor.

Palmetto Bluff

- 5/1/24 issued 4 Notice of Violations to Coastal Waste and Recycling for dumpster placements w/o a Bluffton Business License.
- The company contacted the town business licensing department to get their license current.

Baleada Express 4 Oliver Court Unit #102

- 5/10/24 visited this location, issued NOV to get business license current.
- Licensing advised they fixed license.

Crudo Restaurant 14 Promenade Unit #102

- 5/10/24 location visited, issued NOV due to license not current and taxes owed.
- Licensing advised they fixed license and paid back taxes.

Palmetto Axes 4375 Bluffton Parkway

- Per Licensing changing ownership 6/1/24
- Has not yet obtained ABL for this location, are able to use present owners until theirs is valid.
- The licensing department asked that I visit during the week of June 3 to check the situation. Codes will investigate this matter at that time.

- Community Action Team - No data available at this time.

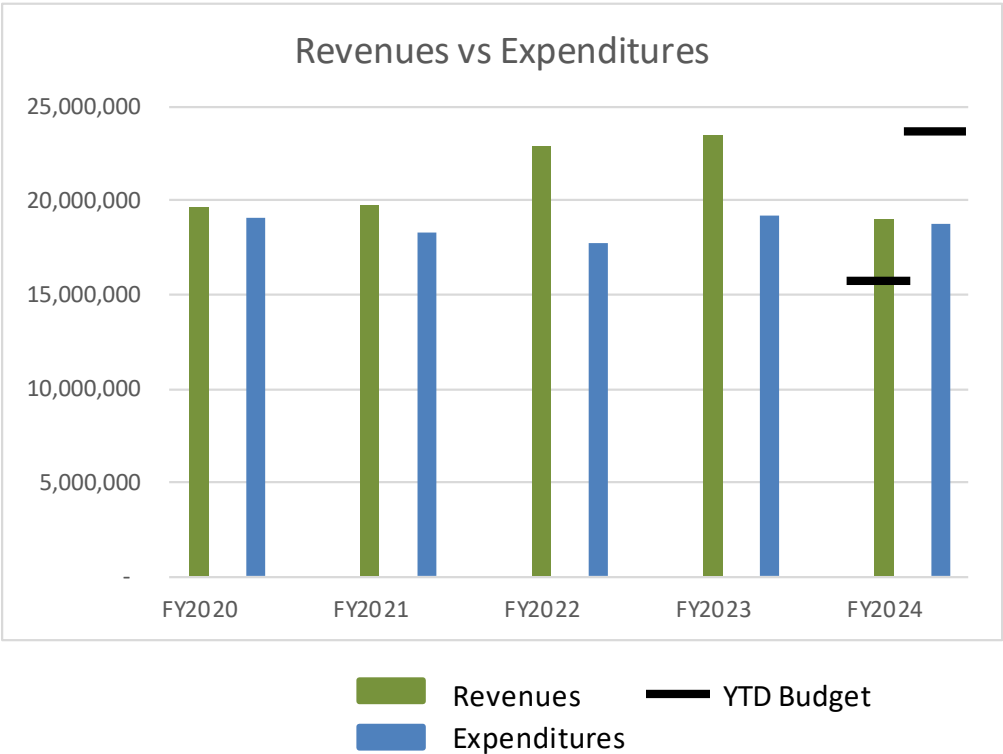
TOWN COUNCIL
STAFF REPORT
Finance & Administration Department



MEETING DATE:	June 11, 2024
PROJECT:	Consent Agenda: Year-to-date Financial Report
PROJECT MANAGER:	Natalie Majorkiewicz, CGFO, Director of Finance & Administration

General Fund Financial Overview:

The chart below shows the revenue collections and expenditures trend for the last four full years and FY2024 year-to-date (YTD) through April 2024. Revenues have been higher than expenditures for the last four full years.



FY2024 YTD through April shows General Fund revenues above the budgeted amount in all line items except for MASC Insurance Tax Collection, Fines & Fees, and Miscellaneous revenues. YTD April expenditures are tracking below the budgeted amounts.

FY24 General Fund Financial Overview

Revenues		Expenditures
\$18,994k	<i>YTD</i>	\$18,737k
130.1%	<i>% of Budget</i>	78.1%
\$14,598k	<i>YTD Budget</i>	\$23,987k

ATTACHMENTS:

1. General Fund
2. Stormwater Fund
3. Capital Improvement Program Fund
4. Debt Service Fund
5. Special Revenue Funds
6. Business License Statistics
7. Grant Index



Town of Bluffton
Actual Versus Budget
For Period Ending April 30, 2024

Section X. Item #1.

	Month of April 2024					Year-to-Date thru April 30, 2024				
	FY 2023	FY 2024	More/(Less)	Budget	Over / (Under)	FY 2023	FY 2024	More/(Less)	Budget	Over / (Under)
Revenues										
Property Taxes	\$ 269,345	\$ 339,665	\$ 70,320	\$ 308,096	\$ 31,569	\$ 8,790,246	\$ 9,873,248	\$ 1,083,001	\$ 8,852,146	\$ 1,021,102
Licenses & Permits										
Business Licenses	540,075	1,770,893	1,230,818	543,831	1,227,062	1,781,419	3,408,496	1,627,077	1,732,987	1,675,509
MASC Telecommunications	-	-	-	-	-	56,096	55,332	(764)	48,720	6,612
MASC Insurance Tax Collection	116,734	77,703	(39,031)	109,861	(32,158)	158,554	79,695	(78,859)	149,219	(69,524)
Franchise Fees	-	148,148	148,148	-	148,148	1,000,217	1,141,041	140,824	1,068,662	72,379
Building Safety Permits	242,336	251,323	8,987	176,936	74,387	2,229,433	2,127,505	(101,928)	1,373,210	754,295
Application Fees	9,040	6,905	(2,135)	6,894	11	49,700	75,135	25,435	37,904	37,231
Total Licenses & Permits	908,185	2,254,972	1,346,787	837,522	1,417,450	5,275,418	6,887,204	1,611,786	4,410,702	2,476,502
Grants and Entitlements	-	-	-	-	-	328,299	604,738	276,439	155,166	449,572
Intergovernmental	-	-	-	-	-	293,516	307,943	14,427	245,077	62,866
Service Revenues	43,373	88,656	45,283	42,998	45,658	499,574	697,120	197,545	511,456	185,664
Fines & Fees	13,423	11,563	(1,860)	15,108	(3,545)	102,766	107,531	4,765	115,694	(8,163)
Interest Income	21,969	28,323	6,354	17,282	11,041	162,919	282,571	119,653	25,000	257,571
Miscellaneous Revenues	6,909	5,513	(1,396)	2,815	2,698	181,590	82,270	(99,320)	97,155	(14,885)
Total Revenues	<u>1,263,204</u>	<u>2,728,692</u>	<u>1,465,488</u>	<u>1,223,821</u>	<u>1,504,871</u>	<u>15,634,329</u>	<u>18,842,625</u>	<u>3,208,296</u>	<u>14,412,396</u>	<u>4,430,229</u>
Other Financing Sources	-	-	-	-	-	-	-	-	-	-
Transfers In	-	-	-	-	-	133,301	151,222	17,921	185,205	(33,983)
Total Other Financing Sources & Transfers In	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>133,301</u>	<u>151,222</u>	<u>17,921</u>	<u>185,205</u>	<u>(33,983)</u>
Total Revenues and Other Financing Sources	<u>\$ 1,263,204</u>	<u>\$ 2,728,692</u>	<u>\$ 1,465,488</u>	<u>\$ 1,223,821</u>	<u>\$ 1,504,871</u>	<u>\$ 15,767,630</u>	<u>\$ 18,993,847</u>	<u>\$ 3,226,218</u>	<u>\$ 14,597,601</u>	<u>\$ 4,396,246</u>
Expenditures										
Town Council	\$ 9,929	\$ 11,400	\$ 1,471	\$ 16,542	\$ (5,142)	\$ 102,301	\$ 100,009	\$ (2,292)	\$ 150,932	\$ (50,923)
Executive	136,895	112,381	(24,514)	401,418	(289,037)	1,070,403	1,127,829	57,426	1,301,959	(174,130)
Economic Development	35,256	29,961	(5,295)	52,725	(22,764)	300,349	365,524	65,175	485,790	(120,266)
Human Resources	32,179	72,895	40,715	46,998	25,897	370,211	448,148	77,937	635,197	(187,049)
Communications and Community Outreach	34,702	34,949	247	68,813	(33,864)	349,338	435,937	86,599	595,782	(159,845)
Police	534,045	954,119	420,074	835,209	118,910	6,261,410	7,443,860	1,182,450	9,889,526	(2,445,666)
Municipal Judges	9,610	13,443	3,833	28,316	(14,873)	53,459	78,540	25,081	111,591	(33,051)
Municipal Court	25,817	28,588	2,771	31,588	(3,000)	352,419	388,329	35,910	458,442	(70,113)
Finance	62,465	68,408	5,943	69,728	(1,320)	670,099	821,637	151,538	1,170,317	(348,680)
Information Technology	113,398	91,089	(22,309)	202,982	(111,893)	1,431,246	1,487,897	56,651	2,141,191	(653,294)
Customer Service	17,436	15,252	(2,184)	22,361	(7,109)	182,539	205,712	23,173	259,261	(53,549)
Planning & Community Development	161,171	92,553	(68,619)	161,053	(68,500)	1,064,351	1,186,509	122,159	1,338,748	(152,239)
Building Safety	48,153	65,125	16,973	75,071	(9,946)	724,898	779,478	54,580	962,495	(183,017)
Project Management	67,063	56,785	(10,278)	78,974	(22,189)	702,325	622,220	(80,105)	703,118	(80,898)
Public Works	144,669	177,260	32,591	177,572	(312)	1,675,294	1,592,759	(82,534)	1,675,285	(82,526)
Town Wide	138,047	171,923	33,876	181,705	(9,782)	2,176,614	1,652,417	(524,197)	2,106,871	(454,454)
Total Expenditures	<u>1,570,835</u>	<u>1,996,130</u>	<u>425,295</u>	<u>2,451,055</u>	<u>(454,925)</u>	<u>17,487,255</u>	<u>18,736,805</u>	<u>1,249,550</u>	<u>23,986,505</u>	<u>(5,249,700)</u>
Other Financing Uses										
Transfers Out to Capital Improvements Program Fund	-	-	-	-	-	-	-	-	-	-
Total Transfers	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Total Expenditures and Other Financing Uses	<u>\$ 1,570,835</u>	<u>\$ 1,996,130</u>	<u>\$ 425,295</u>	<u>\$ 2,451,055</u>	<u>\$ (454,925)</u>	<u>\$ 17,487,255</u>	<u>\$ 18,736,805</u>	<u>\$ 1,249,550</u>	<u>\$ 23,986,505</u>	<u>\$ (5,249,700)</u>



Town of Bluffton
Actual Versus Budget
For Period Ending April 30, 2024

Section X. Item #1.

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	Month of April 2024					Year-to-Date thru April 30, 2024				
	FY 2023	FY 2024	More/(Less)	Budget	Over / (Under)	FY 2023	FY 2024	More/(Less)	Budget	Over / (Under)
Revenues										
Stormwater Utility Fee	\$ (23,882)	\$ 20,999	\$ 44,882	\$ (25,729)	\$ 46,729	\$ 1,984,162	\$ 2,077,587	\$ 93,426	\$ 2,137,615	\$ (60,028)
Licenses & Permits										
NPDES Plan Review Fee	10,235	1,850	(8,385)	6,117	(4,267)	85,585	95,380	9,795	51,153	44,227
NPDES Inspection Fee	23,400	27,650	4,250	18,715	8,935	318,175	262,850	(55,325)	254,471	8,379
Total Licenses & Permits	33,635	29,500	(4,135)	24,832	4,668	403,760	358,230	(45,530)	305,624	52,606
Total Revenues	9,753	50,499	40,747	(897)	51,396	2,387,922	2,435,817	47,896	2,443,239	(7,422)
Total Revenues and Other Financing Sources	\$ 9,753	\$ 50,499	\$ 40,747	\$ (897)	\$ 51,396	\$ 2,387,922	\$ 2,435,817	\$ 47,896	\$ 2,443,239	\$ (7,422)
Expenditures										
Watershed Management	\$ 62,169	\$ 149,064	\$ 86,895	\$ 104,001	\$ 45,063	\$ 1,013,066	\$ 997,505	\$ (15,561)	\$ 1,694,746	\$ (697,241)
Total Expenditures	62,169	149,064	86,895	104,001	45,063	1,013,066	997,505	(15,561)	1,694,746	(697,241)
Other Financing Uses										
Transfers Out to Capital Improvements Program Fund	-	-	-	-	-	-	-	-	-	-
Transfers Out to General Fund	-	-	-	-	-	-	-	-	-	-
Transfer Out to Debt Service	-	-	-	-	-	73,150	69,400	(3,750)	280,384	(210,984)
Contribution to Fund Balance	-	-	-	-	-	-	-	-	-	-
Total Transfers	-	-	-	-	-	73,150	69,400	(3,750)	280,384	(210,984)
Total Expenditures and Other Financing Uses	\$ 62,169	\$ 149,064	\$ 86,895	\$ 104,001	\$ 45,063	\$ 1,086,216	\$ 1,066,905	\$ (19,311)	\$ 1,975,130	\$ (908,225)



Town of Bluffton
Budget and Actual - Capital Improvement Program Fund
For Period Ending April 30, 2024

	YTD Actual	Adopted Budget	Budget Amendments and Transfers	Revised Budget	Actual vs Budget Difference	Actual as % of Budget
Economic Development						
Buckwalter Place Multi-County Commerce Park Phase 2	\$ 131,641	\$ 3,327,940	\$ 176,480	\$ 3,504,420	\$ 3,372,779	3.8%
Total Economic Development	131,641	3,327,940	176,480	3,504,420	3,372,779	3.8%
Facilities						
Town Hall Improvements	195,323	250,000	50,000	300,000	104,677	65.1%
Squire Pope Carriage House	738,775	1,035,586	585,858	1,621,444	882,669	45.6%
Law Enforcement Center Facility Improvements	74,981	156,500	38,485	194,985	120,004	38.5%
Sarah Riley Hooks Cottage	30,861	345,217	19,215	364,432	333,571	8.5%
Total Facilities	1,039,941	1,787,303	693,558	2,480,861	1,440,920	41.9%
Housing						
Affordable Housing Project	20,196	1,708,672	(32,628)	1,676,044	1,655,848	1.2%
Total Housing	20,196	1,708,672	(32,628)	1,676,044	1,655,848	1.2%
Information Technology Infrastructure						
Community Safety Cameras Phase 6	-	68,500	-	68,500	68,500	0.0%
Network Improvements	49,202	130,000	9,971	139,971	90,769	35.2%
Document Management - Phase 2	-	290,000	(290,000)	-	-	N/A
Total Parks	49,202	488,500	(280,029)	208,471	159,269	23.6%
Land						
Land Acquisition	2,533,833	3,998,175	995,045	4,993,220	2,459,387	50.7%
Total Land	2,533,833	3,998,175	995,045	4,993,220	2,459,387	50.7%
Parks						
Park Improvements	159,556	354,700	145,438	500,138	340,582	31.9%
Oyster Factory Park	530,371	1,041,110	406,132	1,447,242	916,871	36.6%
Oscar Frazier Park	357,399	1,030,000	85,419	1,115,419	758,020	32.0%
New Riverside Park/Barn Site	2,332,351	4,880,693	1,095,323	5,976,016	3,643,665	39.0%
New River Trail	263,055	28,195	2,075,555	2,103,750	1,840,695	12.5%
New Riverside Village Park	157,301	288,000	-	288,000	130,699	54.6%
Public Art	-	-	100,000	100,000	100,000	0.0%
Total Parks	3,800,034	7,622,698	3,907,867	11,530,565	7,730,531	33.0%
Roads						
Historic District Streetscape and Drainage Improvements	83,165	378,121	282,250	660,371	577,206	12.6%
Calhoun Street Streetscape	34,540	447,837	229,680	677,517	642,977	5.1%
BIS Neighborhood Sidewalks & Lighting	62,110	-	186,263	186,263	124,153	0.0%
Goethe-Shultz Neighborhood Sidewalks & Lighting	7,244	-	297,500	297,500	290,256	2.4%
Wharf Street Lighting	-	185,750	58,810	244,560	244,560	0.0%
Boundary Street Lighting	-	-	44,403	44,403	44,403	0.0%
Boundary Street Streetscape	2,258	893,050	43,731	936,781	934,523	0.2%
Townwide Wayfinding Signage System	-	40,000	-	40,000	40,000	0.0%
Ghost Roads	6,943	376,000	12,177	388,177	381,234	1.8%
Total Roads	196,260	2,320,758	1,154,814	3,475,572	3,279,312	5.6%
Stormwater and Sewer						
Sewer Connections Policy	556,945	384,000	753,776	1,137,776	580,831	49.0%
Buck Island Sewer Phase 5	1,546,253	2,400,000	151,436	2,551,436	1,005,183	60.6%
Historic District Sewer Extension Phase 2	139,391	-	323,446	323,446	184,055	43.1%
Historic District Sewer Extension Phase 3	137,031	-	199,124	199,124	62,093	68.8%
Historic District Sewer Extension Phase 4	1,302	520,140	38,823	558,963	557,661	0.2%
Historic District Sewer Extension Phase 5	1,064	468,480	35,034	503,514	502,450	0.2%
Historic District Sewer Extension Phase 6	1,866	579,600	42,037	621,637	619,771	0.3%
Bridge Street Streetscape	205,266	110,490	565,927	676,417	471,151	30.3%
Comprehensive Drainage Plan Improvements	1,484	228,100	59,417	287,517	286,033	0.5%
May River Action Plan Impervious Restoration/Water Quality Project	60,979	459,000	-	459,000	398,021	13.3%
Stoney Crest Campground/Old Palmetto Bluff Rd	-	419,099	-	419,099	419,099	0.0%
Pritchard Street Drainage Improvements	37,954	1,442,706	9,990	1,452,696	1,414,742	2.6%
Total Stormwater and Sewer	2,689,535	7,011,615	2,179,010	9,190,625	6,501,090	29.3%
Total CIP Expenditures	\$ 10,460,641	\$ 28,265,661	\$ 8,794,117	\$ 37,059,778	\$ 26,599,137	28.2%



Town of Bluffton
Actual Versus Budget
For Period Ending April 30, 2024

Section X. Item #1.

	Month of April 2024					Year-to-Date thru April 30, 2024				
	FY 2023	FY 2024	More/(Less)	Budget	Over / (Under)	FY 2023	FY 2024	More/(Less)	Budget	Over / (Under)
Revenues										
Property Taxes										
Real & Personal Property Tax (TIF)	\$ 26,972	\$ 36,257	\$ 9,286	\$ 24,478	\$ 11,779	\$ 3,500,856	\$ 4,114,550	\$ 613,694	\$ 3,177,179	\$ 937,371
GO Bond Debt Service Property Tax	12,435	7,521	(4,914)	11,589	(4,068)	406,049	448,316	42,267	378,421	69,895
Total Property Tax	39,407	43,778	4,371	36,067	7,711	3,906,905	4,562,866	655,961	3,555,600	1,007,266
Licenses & Permits										
Municipal Improvement District Fee	2,575	1,200	(1,375)	2,632	(1,432)	357,075	368,761	11,685	364,940	3,821
Interest Income	4,712	11,298	6,586	353	10,946	39,223	97,115	57,892	2,936	94,179
Miscellaneous Revenues	-	-	-	-	-	-	-	-	-	-
Total Revenues	46,694	56,276	9,582	39,052	17,224	4,303,203	5,028,742	725,539	3,923,476	1,105,266
Other Financing Sources	-	-	-	-	-	-	-	-	-	-
Transfers In	-	-	-	72,533	(72,533)	73,150	69,400	(3,750)	72,533	(3,133)
Total Other Financing Sources & Transfers In	-	-	-	72,533	(72,533)	73,150	69,400	(3,750)	72,533	(3,133)
Total Revenues and Other Financing Sources	\$ 46,694	\$ 56,276	\$ 9,582	\$ 111,585	\$ (55,308)	\$ 4,376,353	\$ 5,098,142	\$ 721,789	\$ 3,996,009	\$ 1,102,134
Expenditures										
Series 2014 TIF Bonds Debt Service										
Principal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 851,304	\$ 873,554	\$ 22,250	\$ 873,554	\$ -
Interest	-	-	-	-	-	45,680	34,698	(10,982)	34,698	-
Series 2022 TIF Bonds Debt Service										
Principal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Interest	-	-	-	-	-	-	-	-	-	-
Series 2020 GO Bonds Debt Service										
Principal	-	-	-	-	-	230,000	245,000	15,000	245,000	-
Interest	-	-	-	-	-	145,800	134,300	(11,500)	134,300	-
Series 2020A GO Bonds Debt Service										
Principal	-	-	-	-	-	-	-	-	-	-
Interest	-	-	-	-	-	73,150	69,400	(3,750)	69,400	-
Miscellaneous	-	-	-	-	-	-	-	-	-	-
Total Expenditures	-	-	-	-	-	1,345,934	1,356,952	11,018	1,356,952	-
Other Financing Uses										
Transfers Out to Capital Improvements Program Fund	-	-	-	-	-	-	-	-	-	-
Total Transfers	-	-	-	-	-	-	-	-	-	-
Total Expenditures and Other Financing Uses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,345,934	\$ 1,356,952	\$ 11,018	\$ 1,356,952	\$ -



Town of Bluffton
Special Revenue Accounts
For Period Ending April 30, 2024

Section X. Item #1.

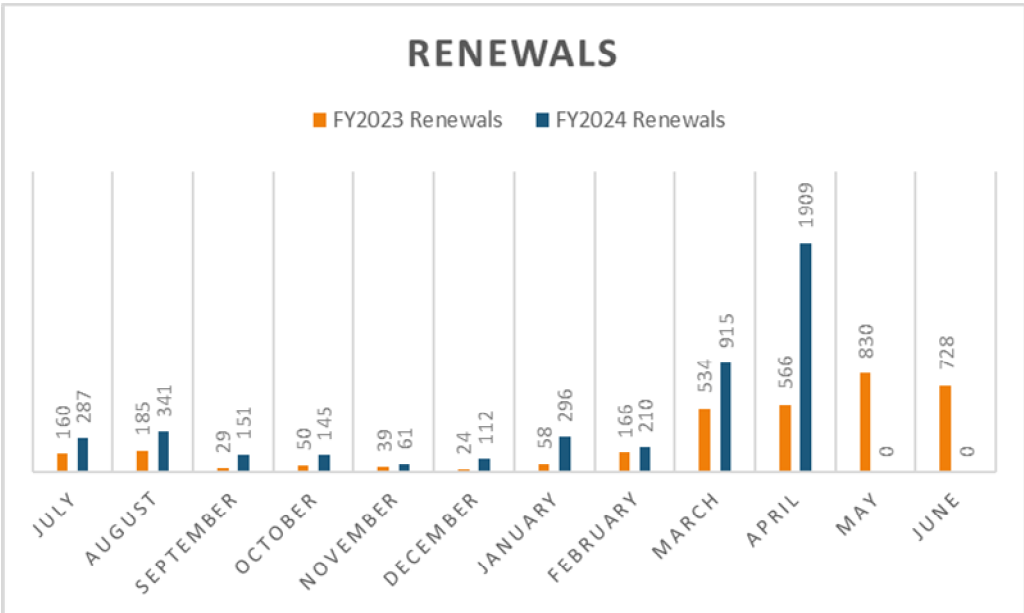
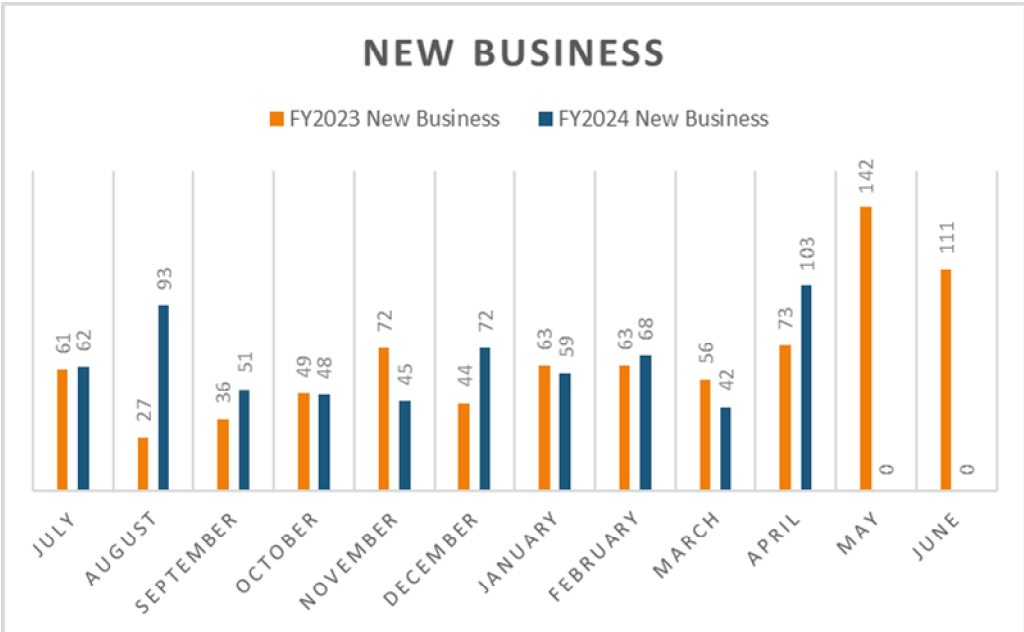
FY2024														Original Estimate
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	Period 13	YTD
Revenues														
State Accommodations Tax	1,533	1,721	1,963	237,553	1,773	2,006	249,085	1,857	2,041	161,351				660,882
Local Accommodations Tax	5,551	151,068	108,061	124,885	176,611	171,277	117,868	70,760	98,795	183,177				1,208,053
Hospitality Tax	55,959	340,329	282,100	283,048	355,917	349,776	385,692	223,058	314,287	382,122				2,972,287
Total Revenues	63,043	493,118	392,124	645,486	534,301	523,059	752,644	295,675	415,123	726,649	-	-	-	4,841,222

FY2023														Original Estimate
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	Period 13	YTD
Revenues														
State Accommodations Tax	400	468	509	256,141	783	897	229,281	916	1,155	145,283	1,388	1,466	484,835	1,123,522
Local Accommodations Tax	614	173,603	126,868	137,517	152,941	158,074	114,639	63,354	83,215	24,975	331,683	187,863	176,431	1,731,778
Hospitality Tax	4,685	255,181	281,079	312,591	335,754	307,857	291,337	235,565	310,100	87,619	491,342	352,679	405,875	3,671,664
Total Revenues	5,699	429,252	408,456	706,249	489,478	466,828	635,257	299,835	394,471	257,876	824,412	542,009	1,067,141	6,526,963

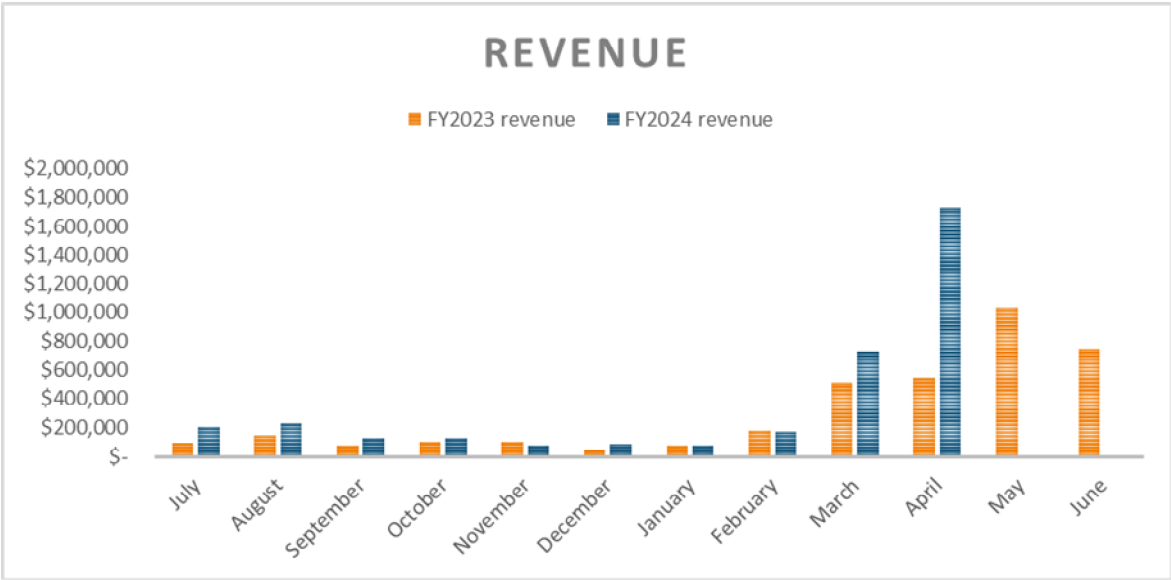
FY2024 VS FY2023 (more / (less))													
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	Period 13
Revenues													
State Accommodations Tax	1,133	1,253	1,454	(18,588)	990	1,109	19,804	941	886	16,068			25,049
Local Accommodations Tax	4,937	(22,535)	(18,807)	(12,632)	23,670	13,203	3,229	7,406	15,580	158,202			172,252
Hospitality Tax	51,274	85,148	1,021	(29,543)	20,163	41,919	94,355	(12,507)	4,187	294,503			550,520
Total Revenues	57,344	63,866	(16,332)	(60,763)	44,823	56,231	117,388	(4,160)	20,652	468,773	-	-	747,821

Business License Statistics:

Business License applications for FY2024 through April total 5,070 (643 new business and 4,427 renewals) compared to FY2023’s total of 2,355 (544 new business and 1,811 renewals).



Business license renewals reflect an increase of 237% or 1,343 and revenue collections increased 220% or \$1,186,559 for the month of April when comparing to last year. This large increase is due to the efficiencies the new business license software, Evolve, has offered with revenue and business licenses being immediately and eliminating the large backlog with having to enter in information manually.



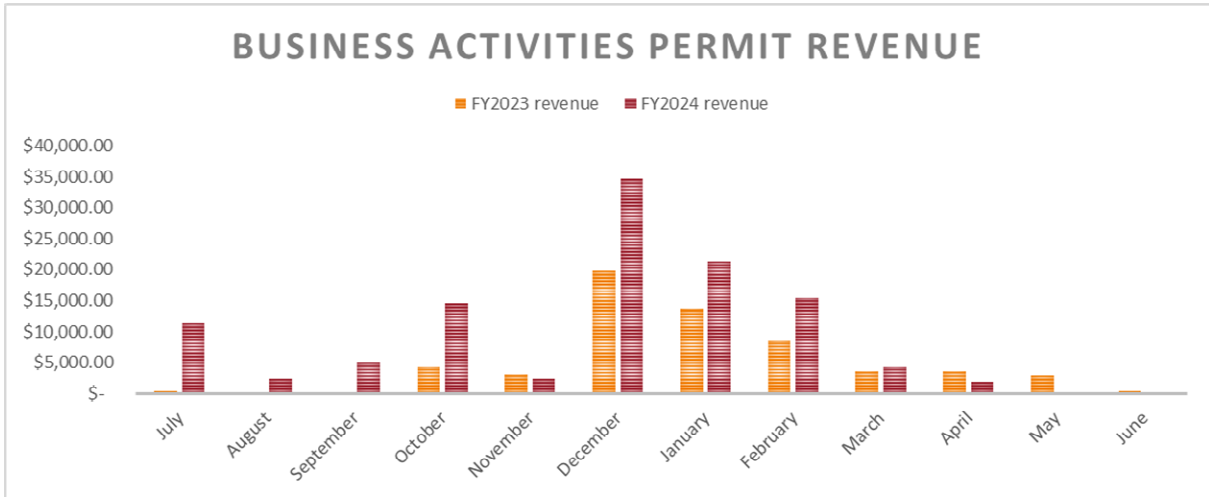
The amended ordinance that went into effect January 1st, 2019 included additional incentives for new businesses and businesses with multiple locations within the Town. For the 2024 business license renewals through March, two hundred, seventy-four (274) business have qualified for the Town’s incentives for a total revenue reduction of \$69,213.

Incentive	Number of Businesses	Gross Income Deducted	Total Incentive Amount
10%	171	\$ 7,541,673	\$ 10,365
20%	206	11,874,998	16,025
40%	145	9,795,330	14,041
CAP	9	161,674,934	163,044
2+	61	16,976,813	16,118
Grand Total	592	\$ 207,863,728	\$ 219,593

Rate Class	Number of Businesses	Total Incentive Amount
1	170	\$ 165,133
2	15	3,710
3	43	1,365
4	96	6,031
5	61	5,615
7	161	17,515
8.1	40	4,694
8.51	1	51
8.6	1	300
9.3	4	15,179
Grand Total	592	\$ 219,593

Included in the Business License Revenue are permits for both Mobile Vending and Short-Term Rental.

- Mobile Vending Permit (MVP): \$400 for a calendar year
 - Three (2) 2027 MVPs issued in April
 - Twenty-three (23) are compliant
 - Two (2) are non-compliant
 - None are pending
 - There are twenty-five (25) identified Mobile Vending businesses
- Short-Term Rental Permit (STRP): \$325 for a calendar year
 - Two (2) 2024 STRPs issued in April
 - One hundred and ninety-three (193) STRPs are compliant with a permit
 - Ninety-one (91) are non-compliant
 - Eight (8) are in-process
 - There are two hundred and ninety-two (292) properties identified



Grant Program / Name	Federal/ State/ Other	Grant #	Town Project Description	Department	Status	Amount Funded by Grant	Town's Match	Total Project Amount	Date of Award	Grant Start Date	Grant Expiration
South Carolina Infrastructure Investment Program (SCIIP)	Federal	A-23-C015	Stoney Crest area septic to sewer; local match split equally among Town, Beauf.Co, and BJWSA.	Stormwater	AWARDED TO BJWSA	\$ 5,925,000.00	\$1,975,000 divided equally among Town, County, and BJWSA	\$7,900,000.00	04/27/23	04/24/23	6/1/2026
American Rescue Plan Act (ARPA) grant from the State and Local Fiscal Recovery Fund (SLFRF)	Federal	SLT-5134	coronavirus recovery, Entitlement community with Tier 5 reporting	Finance	Active	\$ 1,982,471.00	none	\$1,982,471.00	05/27/21	03/03/21	obligated by 12/31/2024 expended by 12/31/2026
Community Development Block Grant (CDBG)	Federal	4-A-19-001	BIS sanitary sewer, Phase 5	CIP	Active	\$ 500,000.00	\$ 3,002,282.00	\$3,502,282.00	10/14/19	10/14/19	12/30/2023
Land and Water Conservation Fund	Federal	45-01131	New Riverside Barn Park	CIP	Active	\$ 500,000.00	\$ 500,000.00	Phase I > \$1M	10/18/21	10/19/21	10/31/2023; extended to 7/31/2024
Bureau of Justice Assistance Office Programs Bulletproof Vest Partnership - 2021	Federal	Not Provided	Bulletproof Vests for Police Officers	Police	closed	\$ 1,637.10	\$ 1,637.10	\$ 3,274.20	04/28/22	09/30/21	8/31/2023
Section 319(h) Nonpoint Source Pollution, Assistance Program	Federal	EQ-0-263	May River Watershed Action Plan Phase IV; sewer connections (Poseys Court, Pritchard Street, Bridge Street)	Stormwater / CIP	Active	\$ 365,558.36	\$ 243,830.00	\$ 609,388.36	06/21/19	09/25/19	7/24/2023; extended to 9/30/2024
Nonpoint Source Implementation Program - Section 319(h) of the Clean Water Act	Federal	EQ-1-599	May River Watershed Action Plan, Phase V - stormwater retrofit (Bridge St)	Stormwater / CIP	closed	\$ 228,165.15	\$ 152,110.10	\$ 380,275.25	10/01/20	12/04/20	12/3/2023
FFY 2023 Justice Assistance Grant (JAG)	Federal	5G003322	Domestic Violence Investigator and Community Mental Health Officer	Police	closed	\$ 141,404.40	\$ 15,711.60	\$ 157,116.00	10/14/22	10/01/22	9/30/2023
Nonpoint Source Implementation Program - Section 319(h) of the Clean Water Act	Federal	EQ-3-544	May River Watershed Action Plan, Phase VI - stormwater retrofit (Pritchard St)	Stormwater / CIP	Active	\$ 124,577.00	\$ 83,398.00	\$ 207,975.00	11/16/22	11/16/22	11/15/2025
Nonpoint Source Implementation Program - Section 319(h) - Clean Water Act	Federal	EQ-4-318	May River Phase VII - HD Sewer Phases 4-6	CIP	Active	\$ 529,850.00	\$ 367,920.00	\$ 897,770.00	6/16/2023	2/29/2024	9/30/2027

FY24 Park and Recreation Development Fund (PARD)	State	Project Number 2023057	New River Trail Restroom Shelter	CIP	Active	\$ 26,000.00	\$ 6,500.00	\$ 32,500.00	05/08/23	05/08/23	5/8/2026
School Safety Program FY24 (School Resource Officer)	State	SR-076-C0702-24	SRO funding for six officers	Police	Active	\$ 893,422.29	none	\$ 893,422.29	6/16/2023	7/1/2023	6/30/2024
FY24 State Appropriation Act	State	none	New River Linear Trail	CIP	Active	\$ 2,000,000.00	\$ 705,172.00	\$2,705,172.00	10/16/2023	10/16/2023	10/16/2026
FY24 State Appropriation Act	State	none	Agility Course	Police	Active	\$ 50,000.00	none	\$ 50,000.00	9/8/2023	9/8/2023	6/15/2024
StimulateSC	State	2024SSC-01	DRCI Artificial Intelligence Training Program	DRCI	Active	\$ 10,450.00	\$ 10,450.00	\$ 20,900.00	1/2/2024	1/15/2024	10/15/2024

\$ 7,509,058.30

Sen Graham appropriation / COPS Law Enforcement Technology	Federal		equipment for PD	Police	Federal budget approved; pending grant agreement from Dept of Justice	\$ 1,348,178.00	\$ 337,045.00	\$1,685,223.00			9/30/2024
National Opioid Guaranteed Political Subdivision Subfund	State		Opioid settlement money	Police	writing application with PD; will be submitted in April	\$ 25,915.25	none	\$ 25,915.25			6/30/2024
Building Resilient Infrastructure and Communities (BRIC)	Federal		Historic District drainage	Watershed	submitted 12/14	\$ 278,550.00	\$ 30,950.00	\$ 309,500.00			36 months from date of award
School Safety Program FY25 (School Resource Officer)	State		continued funding for six SROs	Police	submitted 2/16/2024	\$ 784,000.00	none	\$ 784,000.00			6/30/2025

TOWN COUNCIL



STAFF REPORT
Human Resources Department

MEETING DATE:	June 11, 2024
PROJECT:	May 2024 Activity Report
PROJECT MANAGER:	Anni Evans, Director of Human Resources

Human Resources Summary:

New Hires: 5

William Ayler
Title: Police Recruit
Start Date: May 30, 2024
Department: Police Department

Matthew Collins
Title: Police Recruit
Start Date: May 30, 2024
Department: Police Department

Christopher Sim
Title: Building Inspector I
Start Date: May 30, 2024
Department: Growth Management Department

Anna Basha
Title: Customer Service Representative
Start Date: May 30, 2024
Department: Growth Management Department

Laurance Beckler
Title: Public Services Director
Start Date: May 30, 2024
Department: Public Services

Exits: 5

Abril Rodriguez
Title: Police Officer
Date: May 1, 2024
Department: Police Department

Jordan Holloway
Title: Senior Planner
Date: May 3, 2024
Department: Growth Management Department

David Brett
Title: Building Inspector
Date: May 10, 2024
Department: Growth Management Department

Thomas Rauchfuss
Title: Quartermaster/Fleet Manager
Date: May 21, 2024
Department: Police Department

Derrick Coaxum
Title: Public Services Director
Date: May 22, 2024
Department: Public Services

Promotions: 2

Mary Sue McEntire
Title: Principal Customer Service Representative
Date: May 2, 2024
Department: Growth Management Department

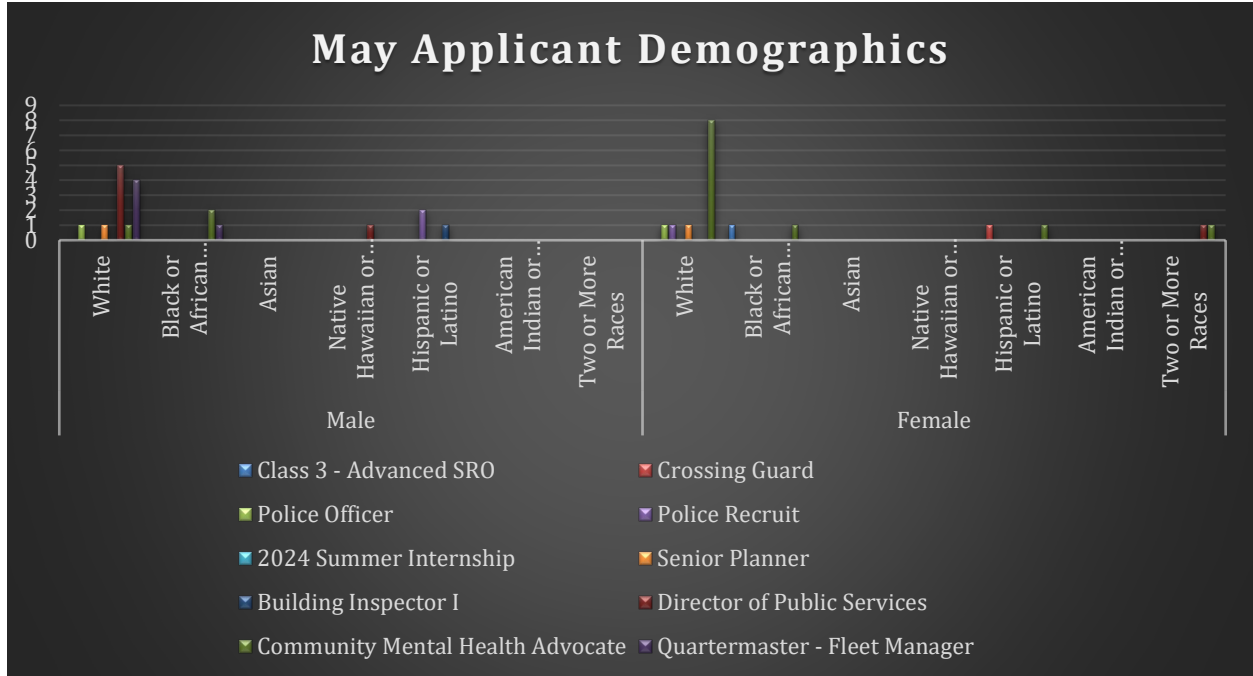
Michael Laccasaggia
Title: Police Corporal
Date: May 2, 2024
Department: Police Department

Jobs posted:

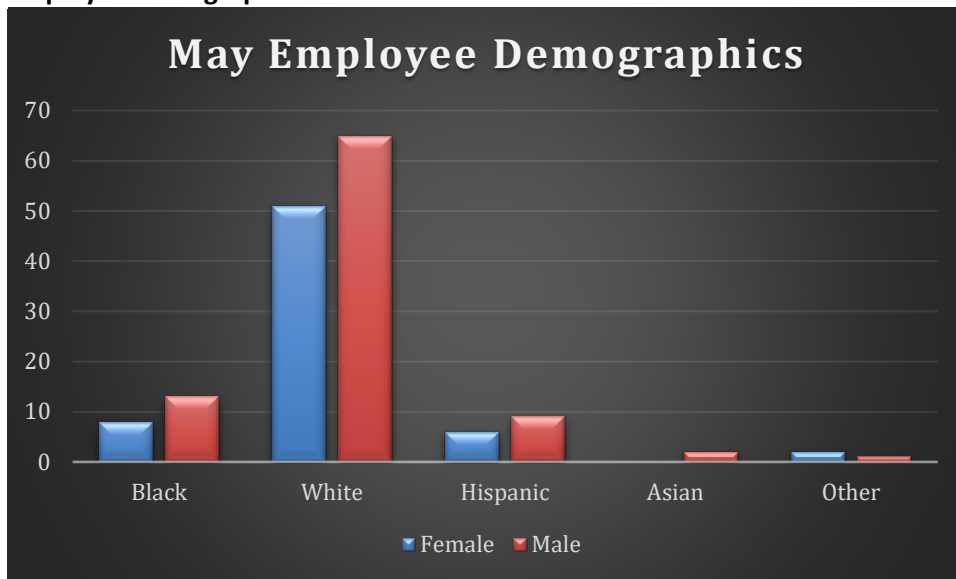
Police Officer
Police Recruit
SRO – Class 3
Crossing Guard
Senior Planner
Director of Public Services
Summer Intern
Building Inspector I
Quartermaster / Fleet Manager
Community Mental Health Advocate

- Birthday/Anniversary Celebration – 5/15 Breakfast bar
- National Public Service Employee Appreciation Week May 5 – May 11
 - Acai Food Truck @ Town Hall 5/9
- National Law Enforcement Recognition Week May 13 – May 17
 - LowCo Grub Food Truck @ LEC 5/14 12pm – 2pm
- National Public Works Week May 19 – 25
 - Ice cream bar held at Public Services workshop 5/23 1pm
- Intern applications received and reviewed, interviews held and selections made
 - Start date: June 3, 2023
- Leadership training developed with First Sun EAP – first time offered for first line supervisors
 - A total of three sessions being held in April, May, and June respectively with follow-up sessions offered for check-ins

Candidate demographics:



Employee demographics:



TOWN COUNCIL



STAFF REPORT
Municipal Court Department

MEETING DATE:	June 11, 2024
PROJECT:	April Activity Report
PROJECT MANAGER:	Lisa Cunningham, Clerk of Court

Court Summary

Town of Bluffton Municipal Court convenes every Tuesday morning. In April 2024 a total of five morning sessions. The Municipal Court currently has 439 cases pending which is a combination of 403 criminal/traffic cases, 16 jury trial requests, and 20 defendants enrolled in alternative programs.

Indigent Defense cases

Town of Bluffton currently contracts with the 14th Circuit Public Defenders Office to provide Indigent Defense Counsel to all defendants who meet the Annual Federal Poverty Guidelines. Year to date our Indigent Defense Attorney has 670 cases which is a combination of 66 pending and 604 disposed on the docket as of April 2024.

Alternative Programs

Defendants are sometimes offered the opportunity to complete Alternative Programs in lieu of convictions on their traffic and/or criminal record.

There are currently 4 active participants in the Conditional Discharge Program. The Conditional Discharge Program requires the completion of 40 hours of community service as well as a drug and alcohol program. Participants must also pay a program fee of \$150.00 upon completion.

There are currently 4 active participants in the Alive@25 classes which are offered through the National Safety Council. Alive@25 classes are for traffic offenders under 25 years of age who have never had a traffic infraction and the current charge pending carries no more than 4 points.

Traffic Education Program referred to as TEP has 3 active participants. The TEP Program cost is \$280.00 plus the cost of online driving class. It is designed for offenders who have pending moving violations except for Driving under the Influence, Driving under Unlawful Alcohol Concentration, and Reckless Driving.

Alcohol Education Program referred to as AEP has 0 active participants. AEP is only inclusive for alcohol related charges such as minor in procession of alcohol or false identification for

offenders between the ages of 17-21. AEP costs \$250.00 plus the cost of online driving class and alcohol education classes.

Pre-Trial Intervention referred to as PTI has 9 active participants. PTI is a program for first-time offenders charged with non-violent crimes all charges are accepted in the program except for Driving Under Influence (DUI) or Driving under Unlawful Alcohol Concentration (DUAC). Program cost \$350.00 plus the cost of online driving class, counseling and/or drug testing.

TEP, AEP, and PTI are directly managed through the Solicitors office. The Court provides a referral and the Solicitors Office provides a completion or termination report upon completion date.

Town of Bluffton Municipal Court Statistics for April 2024

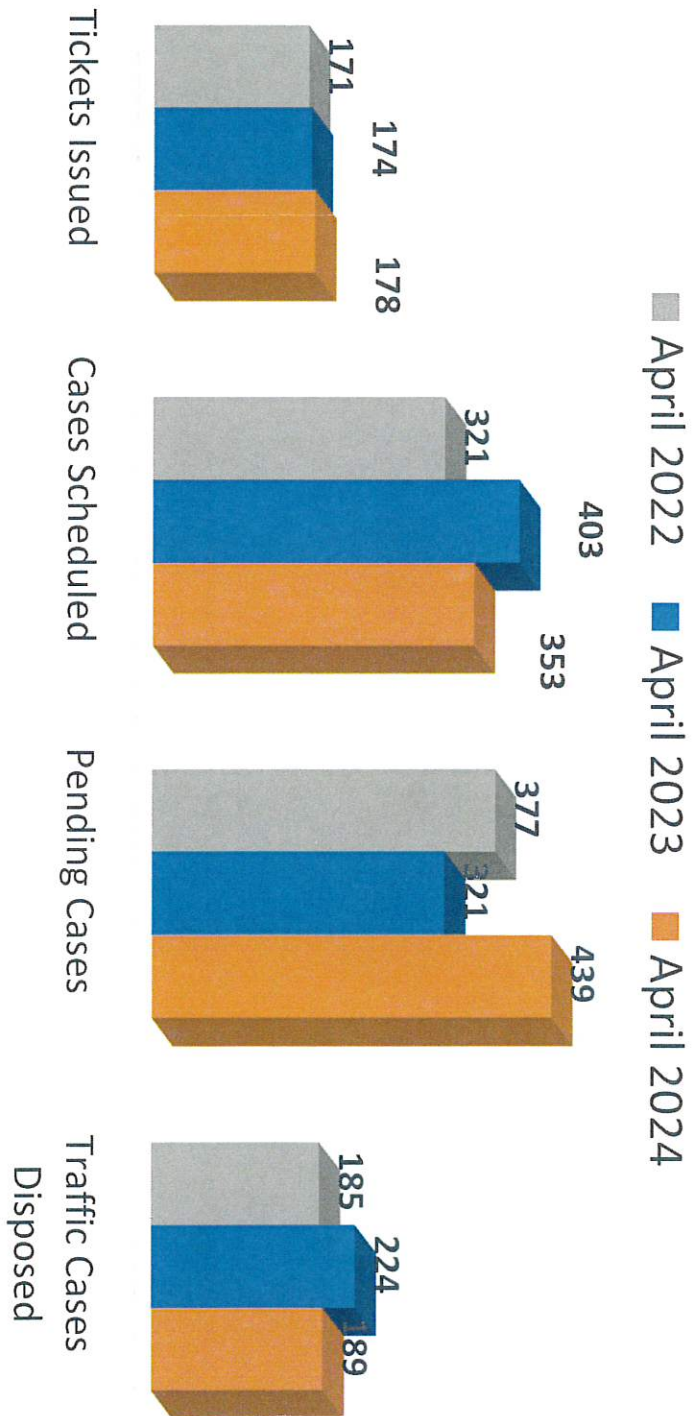
Presented by:

Lisa Cunningham, Clerk of Court



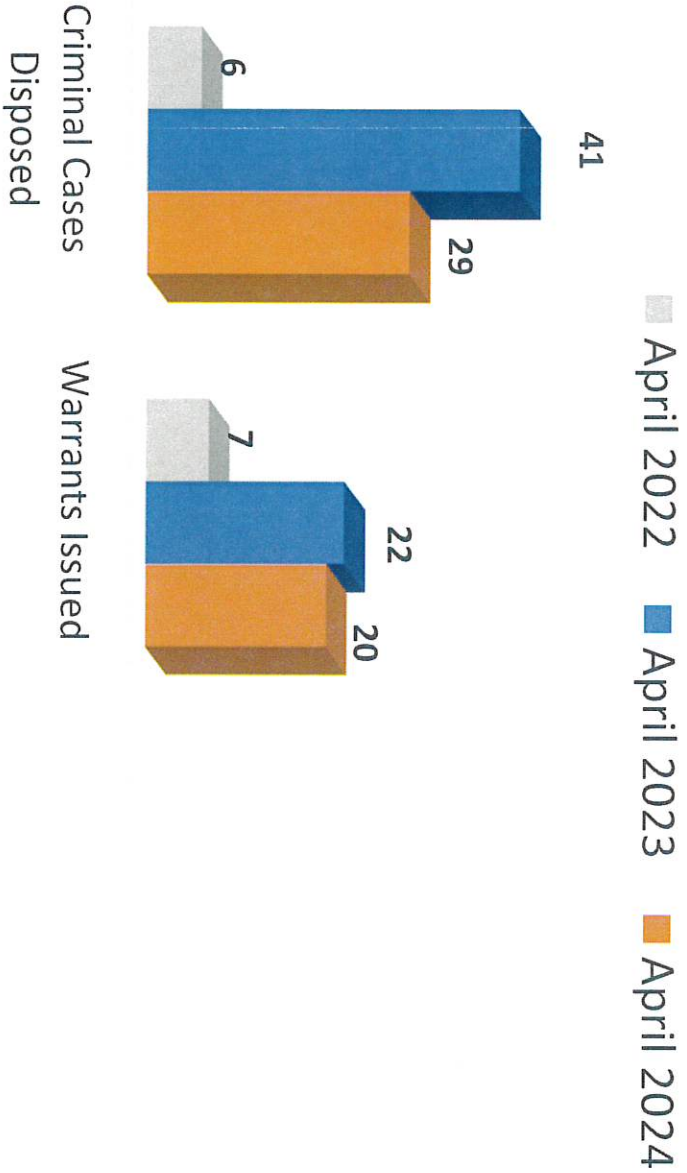


Town of Bluffton Municipal Court



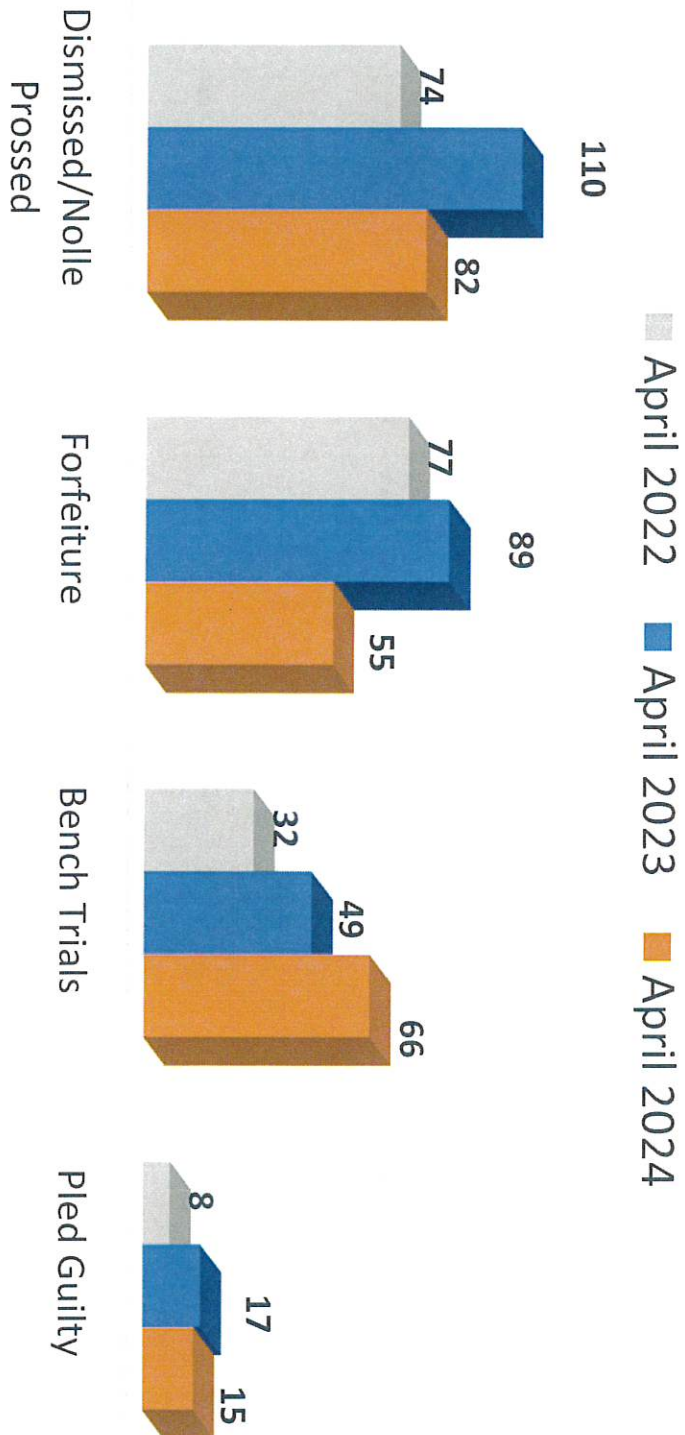


Town of Bluffton Municipal Court





Town of Bluffton Municipal Court



Town of Bluffton Municipal Court



Terminology

- **Disposition** the ruling of the court, the final outcome of the violation.
- **Dismissed** no prosecution because either a program was completed, or motion granted.
- **Nolle Prosequi** the prosecutor or officer did not wish to prosecute the case.
- **Forfeiture** the bond was posted, and defendant did not appear for court, so it was converted to a fine.
- **Guilty Bench Trial** the Judge ruled in favor of the State.
- **Not Guilty Bench Trial** the Judge ruled in favor of the Defendant.
- **Pled Guilty** the defendant did not contest the violations.
- **Disposed** the case is no longer pending and a disposition has been indicated.
- **Pending** the cases awaiting trial or currently enrolled in a program

TOWN COUNCIL

STAFF REPORT
Projects and Watershed Resilience Department



MEETING DATE:	June 11, 2024
SUBJECT:	Projects and Watershed Resilience Department Monthly Report
PROJECT MANAGER:	Kimberly Washok-Jones, Director of Projects and Watershed Resilience

CAPITAL IMPROVEMENTS PROGRAM (CIP) UPDATE

PATHWAYS

1. **Buck Island-Simmons ville Neighborhood Sidewalks and Lighting**
 - Construction of the Phase 6B sidewalks, drainage and lighting is complete.
 - **Next Steps**
 - Complete final As- built survey and closeout with SCDOT.
2. **New River Linear Trail**
 - Received \$26,000 PARD grant award and \$2 million in SC appropriations.
 - Easement donation from New Riverside Community Association, Inc. approved at 3/14/23 Town Council.
 - Restroom purchase agreement approved at 7/11/23 Town Council.
 - Well installed and tested.
 - Dominion utility easement approved at 10/10/23 Town Council.
 - Bathroom 100% plans approved. Bathroom fabrication in progress.
 - Groundbreaking completed 5/30/24.
 - **Next Steps**
 - Continue engineering design and permitting for Phases 1 and 2.
 - Negotiations are ongoing with Central Electric and Santee Cooper for cost sharing terms for trail bridges maintenance.
 - Install bathroom, entry gate and security cameras this Spring.
 - Continue coordination of boardwalk connection for Four Seasons

SEWER & STORMWATER

1. **Buck Island-Simmons ville Sewer (Phases 5A-D)**
 - Mainlines have been installed and laterals construction underway.
 - **Next Steps**
 - Inspection, punch list and approval by BJWSA.

2. **Historic District Sewer Extension Phases 2 & 3 - Bridge & Colcock Streets**
 - Jordan Construction of Hilton Head, Inc. continues construction.
 - Permit to operate issued from BJWSA.
 - Road crossing repaving is complete.
 - **Next Steps**
 - Finalize installation of grinder pumps and house connections.

3. **Historic District Sewer Extension Phases 4 through 6 – Lawrence, Green and Water Streets**
 - Design for Phases 4, 5, & 6 were submitted to BJWSA for initial review.
 - **Next Step**
 - Incorporate BJWSA comments into final construction documents.
 - Construction implementation is pending permit and easement approvals.

4. **May River Watershed Action Plan Impervious Restoration Water Quality Projects**
 - Initial site investigations are complete for 8 of the 11 participating project sites.
 - Palmetto Pointe Towns, Lowcountry Community Church and Apartment One declined to participate in the Program at this time.
 - Geotechnical investigations and reports for each of the remaining 8 original have been completed. Began work to finalize Draft on Section 1 of 3, Fee-in-Lieu and Enterprise Fund establishment/administration. Initial Property Owner contacts for the selected 15 Additional Sites within municipal limits have been made.
 - **Next Steps**
 - Preliminary Design of each of the 8 original sites based on geotechnical data and field walks has been initiated.

HISTORIC DISTRICT IMPROVEMENTS

1. **Boundary Street Lighting**
 - Complete contract revisions with Dominion to install street lighting on the west side of Boundary Street.
 - **Next Steps**
 - Dominion to install street lighting in FY24.

2. **Squire Pope Carriage House Preservation**
 - The contract with Huss Inc. was executed and construction began on 1/16/23.
 - All exterior siding, windows and doors have been refinished and reinstalled. New roofing has been installed. Exterior painting is ongoing. Handicap ramp and handrails are installed. Exterior shutters are complete. Interior trim has been reinstalled. Floor refinishing has begun. Casework is installed. Interior painting is ongoing.
 - **Next Steps**
 - Obtain FY25 budget approval for Welcome Center and office upfit.
 - Landscape design is complete and planned to be installed summer 2024.

3. Bridge Street Streetscape

- Phase 1 completed.
- Initial Stakeholder meeting with Montessori and Hargray completed.
- **Next Steps**
 - Continue Phase 2 engineering design for SCDOT permitting.
 - Continue Phase 2 stakeholder meetings.
 - Close out Phase 1 with SCDOT.
 - Continue Phase 2 planning and design for underground power.

4. Boundary Street Streetscape

- Engineering Design is 70% complete and submitted to Watershed for stormwater initial review.
- Met with Dominion Energy on 5/17/23. Completion of underground conversion plans from Dominion Energy is subject to the Town obtaining easements for May River Transmission line and proposed switch gear locations.
- **Next Steps**
 - Continue with engineering design, underground power coordination, and permitting.
 - Prepare easement exhibits and begin appraisals in FY25.
 - Construction is to begin in 2025, subject to acquisition of all required easements.

5. Calhoun Street Streetscape

- Preliminary engineering design is 40% complete.
- Met with Dominion Energy on 5/17/23. Awaiting underground conversion plans from Dominion Energy.
- **Next Steps**
 - Continue negotiations with May River Road property owners for main transmission line easements. Once the main transmission line easements have been completed, then continue with engineering design into FY25.
 - Prepare easement acquisition plats for Phase 1 in FY25 and begin easement acquisition.
 - Phased construction is planned to begin in FY26 pending budget approval and acquisition of all required easements.

6. Pathway Pedestrian Safety Improvements

- Completed Historic District crosswalk study identifying and prioritizing future intersection/crosswalk improvements to meet ADA compliance.
- Phase 1 ADA sidewalk improvements along Goethe Road were completed on 1/2023.
- Contract with ICE approved at 9/12/23 Town Council meeting.
- **Next Steps**
 - Review Phase 2 final design plans.
 - Follow up with property owners for easement acquisitions.
 - Finalize Phase 3 analysis locations list.

7. Comprehensive Drainage Plan Improvements

- Heyward Cove Work Completed. MSA Task Authorization for individual Asset Owner reports identifying work, results and needed work finalized and pending approval.
- Consultant proposal for work on Crooked and Guerrard Coves finalized and MSA Task Authorization approved at the 4/9/2024 Town Council meeting.
- Public Notice concerning proposed consultant field work to identify and assess condition of stormwater assets in Crooked Cove and Guerrard Cove issued April 26, 2024.
- Consultant field work to identify and assess condition of stormwater assets in Crooked Cove and Guerrard Cove completed May 12, 2024.
- **Next Steps**
 - Compile field data from stormwater inventory and condition assessment.
 - Begin development of 2D Hydrologic/Hydraulic model.

8. Pritchard Street Drainage Improvements

- Project scope has increased to include streetscape elements, pedestrian connectivity, street lighting and traffic calming evaluation. Growth Management and Stormwater Pre-Application meeting held 10/17/2023. Updated 95% design received from consultant, design review complete, and comments discussed with consultant. Permit applications have been submitted. DRC Public Project was held 3/28/2024.
- **Next Steps**
 - Coordinate approval for proposed improvements with Beaufort County School District and Beaufort County on Pool operation impacts.
 - Consultant addressing design and permit review comments for 100% design submittal.
 - Follow-up/complete permitting submissions and bid document formulation.
 - Identification of easement and street lighting needs.

PARK DEVELOPMENT**1. Oyster Factory Park**

- Civil construction and landscape of parking area is complete.
- Construction of the event area is substantially complete. Punch list items to continue through June 2024.
- **Next Steps**
 - Prepare restroom expansion plans, pavilion repairs, and alternate kayak launch concept in FY24.

2. Oscar Frazier Park

- Rotary Center hardscape improvements complete.
- Executed contracts for design/build of the splash pad and associated landscaping.
- **Next Steps**
 - Begin construction of Splash Pad in Summer 2024.

3. New Riverside Barn/Park

- Phase 2 Design is complete.
- JS Construction completed phase 1 site construction in November 2023.
- JS completed additional parking area phase two.
- JS installed hand holes at all future light locations for power and IT infrastructure.
- The contract has been executed with Nix Construction for Construction Manager at Risk Services with a GMP for Phase 2 (barn, restroom, playground, and common areas).
- Nix poured pavilion and future barn slabs.
- Nix has procured all future playground equipment.
- Playground drainage is almost complete.
- Sidewalks at playground area are almost complete.
- Restrooms are framed with roof sheathing installed.
- Rough-in plumbing and electrical at restrooms have started.
- Trellis structures have started at restroom areas.
- Well for future irrigation has been installed.
- **Next Steps**
 - JS to continue paver turn around areas.
 - Nix to start brickwork, siding, and roofing installation at restrooms.
 - Nix to start brickwork and construction at both playground pavilions.

4. New Riverside Village

- Partial order of site furnishings received.
- Trellis swing construction and installation of site furniture contract awarded.
- Lighting contract approved at 4/9/24 Town Council.
- Design plan approved by POA/Developer.
- **Next Steps**
 - Installation of trellis swings, dog stations and trash cans by 6/30/24.
 - Continue design of wayfinding signage plan.
 - Review horizontal directional boring solicitation submissions in preparation for light pole installation.

5. Miscellaneous Park Improvements

- Shade sail installation was completed at Buckwalter Place Park playground.
- **Next Steps**
 - Continue design of landscape and hardscape enhancements at various town parks in 2025.

6. Buckwalter Place Park Improvements

- Plans presented to Town Council on 1/16/24.
- Conceptual landscaping plan complete.
- Sabal palm installation complete.

- **Next Steps**
 - Finalize hardscape plans for FY25 scope.
 - Post lighting plan solicitation.
 - Continuing design, CDs of bathroom renovation.

TOWN FACILITIES AND MISCELLANEOUS PLANNING

1. Town of Bluffton Housing Projects

- **Next Steps**
 - Provide financial assistance to joint venture partner for planning, design and permitting of Affordable/Workforce Housing at 1095 May River Road.
 - PM staff to review progress and applications for payment.

2. Law Enforcement Center Facility Improvements

- PD completed improvements to evidence room.
- PS to add AON system to HVAC.
- **Next Steps**
 - Begin design for FY25 construction of a possible storage of Public Service maintenance equipment, impound lot and canine facility.

3. Sarah Riley Hooks Cottage

- Executed design contracts with Meadors Inc., JK Tiller and Shearlock Engineering for design services of the cottage restoration and site development.
- **Next Steps**
 - Complete design of cottage and grounds in 2024.
 - Begin restoration construction of cottage in FY25.
 - Begin landscape development construction in FY26.

4. Ghost Roads

- Surveying and easement exhibits are complete.
- Bridge Street Quit Claim Deeds are complete. Pritchard and Colcock Streets Quit Claim Deeds are 99% complete. Staff is currently working with Lawrence, Lawton, Green, Pope, Allen, and Water Street property owners to obtain Quit Claim Deeds.
- **Next Steps**
 - Continue acquisition of remaining Quit Claim Deeds for Historic District Ghost Roads or initiate quiet title proceedings.

5. Document Management

- RFP contract was awarded in March 2022.
- Electronic Document Management system is live.
- Documents for 6 departments have been transitioned to DMS.
- **Next Steps:**
 - Historical documents for the remaining departments will transition through FY26.

6. Network Infrastructure

- Replaced core switches at Town Hall and the Law Enforcement Center.
- Replaced two VMWare hosts for a more stable server environment.
- Migration of Munis and Energov systems to a hosted environment completed.
- Implemented Executime to replace Intime.
- **Next Steps:**
 - Replacing two more VMWare hosts.

WATERSHED MANAGEMENT UPDATE

1. **Stoney Creek/Palmetto Bluff Sewer Partnership**
 - 2022 updated cost-estimate for the project from BJWSA is \$7.2 million + contingencies. BJWSA is the Project Manager.
 - BJWSA awarded the RIA SCIPP grant in support of Stoney Creek/Palmetto Bluff Sewer Extension with BJWSA and Beaufort County.
 - Finalized IGA with Town, County, and grant splitting sewer extension costs and BJWSA funding water extension costs.
 - **Next Steps**
 - BJWSA continues with community outreach via their consultants and continues with design of the system.

2. **SC Department of Health and Environmental Control May River Shellfish Harvesting Monitoring Data Year-to-Date and May River Shellfish Harvesting Status Exhibit – *Attachments 1 and 1a***

3. **May River Watershed Action Plan Implementation Summary - *Attachment 2***
 - Staff continue to work with Water Environmental Consultants (WEC) to review continuous flow data from the Stoney Creek, Rose Dhu Creek, and Palmetto Bluff subwatersheds. WEC is reviewing continuous and intermittent flow data in real time. WEC provided recommendations on the Town's water quality grab sampling program to ensure sufficient data for model calibration. Staff began implementing these recommendations on 7/31/23. The flow data monitoring review period ended in April 2024 and final reports are expected to be completed in FY25. Staff continue to implement grab sampling water quality program recommendations.
 - The Town's Calhoun Street Dock tidal elevation gauge was repaired and is recording tidal elevation data. Water Environmental Consultants (WEC) established two (2) additional tide gauges near the Stoney Creek and Rose Dhu Creek model boundaries as part of a 4-week headwaters tidal gauge study. The Calhoun Street dock and headwaters tidal elevation data will be used to establish a relationship between tidal amplitude and timing in the headwaters of the May River. A final report on the 4-week tidal gauge study is expected in FY25 with all other WEC flow monitoring final reports.
 - The Town and the College of Charleston executed a Memorandum of Agreement (MOA) to conduct the Resiliency Analysis. This analysis will include modeling storms and sea level rise throughout Town watersheds, a review of the Town's UDO, Municode, SC Code of Ordinances, and Stormwater Design Manual, and stakeholder engagement through surveys and events.
 - Staff met with Furman University to discuss continued resiliency-related support for the Town on 05/16/24.
 - Staff has drafted a Comprehensive Water Quality Monitoring Program Plan. This document is currently under internal review prior to finalization.
 - Staff provided an overview of the Town's work to improve and protect water quality to Mitchell Black, new reporter for Post & Courier on 05/02/24.

4. **Municipal Separate Storm Sewer System (MS4) Program Update**
 - Staff are currently editing the Stormwater Management Plan with an anticipated date of 6/10/2024, for submittal to SCDHEC.
 - The current Town of Bluffton Southern Lowcountry Stormwater Design Manual is out for public comment until 05/31/24.

5. **MS4 Minimum Control Measure (MCM) - #1 Public Education and Outreach, and MS4 MCM - #2 Public Participation and Involvement**
 - The May River Watershed Action Plan Advisory Committee (WAPAC) meeting e was held 05/23/24. - **Attachment 3**
 - Staff held the 22nd Annual May River Cleanup on 05/04/2024. Approximately 375 volunteers were present.

6. **MS4 MCM – #3 Illicit Discharge Detection and Elimination**
 - Stormwater Infrastructure Inventory Map - **Attachment 4a**
 - *E. coli* Concentrations Trend Map - **Attachment 4b**
 - Staff conducted MRWAP water quality sampling on 04/22/24. Twenty-eight (28) fecal indicator bacteria samples and five (5) intermittent flow measurements were collected from the May River headwaters.
 - Staff conducted MRWAP water quality sampling on 05/15/24. A total of thirty (30) fecal indicator bacteria, fourteen (14) nutrient samples, and three (3) intermittent flow measurements were collected from the May River headwaters.
 - Monthly, Microbial Source Tracking (MST) Maps - **Attachments 4c and 4d**
 - SC Department of Health and Environmental Control (SCDHEC) collects MST samples for the Town concurrently with their routine shellfish harvesting water quality sampling at stations 19-19, 19-19A, 19-19B, 19-19C, and 19-24. SCDHEC collected samples on 05/01/24. The human genetic marker was not detected in any of the samples collected.
 - Illicit Discharge Investigations – **Attachment 4e**

7. **MS4 MCM – #4 Construction Site Stormwater Runoff Control – Attachment 5**

8. **MS4 MCM – #5 Stormwater Plan Review and Related Activity – Attachment 6**

9. **MS4 MCM – #6 Good Housekeeping (Staff Training/Education)**
 - Joe Sease completed his Certified Stormwater Inspector (CSI) certification through the National Pollutant Discharge and Elimination System (NPDES).
 - Andrea Moreno attended the International Erosion Control Association’s (IECA) Municipal Wet Weather Conference on 05/15/24 - 05/16/24.

10. **MS4 MCM – #6 Good Housekeeping (Ditch, Drainage and Roadside Maintenance)**
 - Public Services performed weekly street sweeping on Calhoun Street, Highway 46, Bruin Road, May River Road, Pin Oak Street, and curbs and medians on Simmonsville and Buck Island Roads.
 - Performed ditch inspections.

- Arrow ditch (2,569 LF)
- Red Cedar ditch (966 LF)
- Buck Island roadside ditch (15,926 LF)
- Simmonsville roadside ditch (13,792 LF)
- Ongoing roadside mowing, litter clean-up and maintenance of Masters' Way, McCracken Circle, Hampton Parkway, Buck Island and Simmonsville Roads, Goethe Road, Shults Road, Jason and Able Streets, Whispering Pine Road, May River Road, and Eagles Field.

11. Citizen Drainage, Maintenance, and Inspections Concerns Map – Attachment 7

12. Citizen Request for Watershed Management Services & Activities – Attachment 8

Attachments

1. SCDHEC Shellfish Harvesting Monitoring Data Year-to-Date
 - a. SCDHEC May River Shellfish Harvesting Status Exhibit
2. Quarterly Update – May River Watershed Action Plan Implementation Summary*
3. MS4 Minimum Control Measures #1 and #2 – WAPAC Agenda 04/24/24
4. MS4 Minimum Control Measure #3 – Illicit Discharge Detection and Elimination
 - a. Stormwater Infrastructure Inventory Map
 - b. *E. coli* Concentrations Trend Map
 - c. Microbial Source Tracking Trend Map – Human Source
 - d. Microbial Source Tracking Map – All Sources
 - e. Illicit Discharge Investigations
5. MS4 Minimum Control Measure #4 – Construction Site Stormwater Runoff Control
6. MS4 Minimum Control Measure #5 – Stormwater Plan Review and Related Activity
7. Citizen Drainage, Maintenance, and Inspections Concerns Map
8. Citizen Request for Watershed Management Services and Activities Map
9. CIP Master Project Schedules

* Attachment noted above includes the latest updates in red.

	19-19				19-19A				19-19B				19-19C				19-24				19-16			
	2021	2022	2023	2024	2021	2022	2023	2024	2021	2022	2023	2024	2021	2022	2023	2024	2021	2022	2023	2024	2021	2022	2023	2024
	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)
December	79.0	33.0	33.0		49.0	49.0	33.0		4.5	17.0	7.8		17.0	49.0	13.0		6.8	6.8	7.8		7.8	13.0	17.0	
November	33.0	33.0	13.0		33.0	13.0	2.0		7.8	7.8	4.5		4.0	4.5	4.5		4.5	6.1	2.0		2.0	13.0	4.5	
October	49.0	23.0	33.0		26.0	46.0	23.0		13.0	13.0	17.0		23.0	23.0	33.0		23.0	11.0	2.0		17.0	14.0	6.8	
September	33.0	540.0	23.0		11.0	350.0	13.0		17.0	350.0	13.0		13.0	170.0	7.8		2.0	79.0	17.0		11.0	33.0	13.0	
August	49.0	23.0	23.0		49.0	23.0	49.0		23.0	11.0	6.8		49.0	13.0	13.0		14.0	17.0	23.0		14.0	11.0	2.0	
July	350.0	920.0	350.0		64.0	49.0	920.0		79.0	95.0	70.0		33.0	130.0	49.0		33.0	23.0	33.0		13.0	46.0	17.0	
June	49.0	13.0	14.0		79.0	4.5	7.8		13.0	11.0	23.0		17.0	2.0	13.0		22.0	1.8	33.0		2.0	9.3	13.0	
May	2.0	4.5	23.0	27.0	49.0	4.5	33.0	22.0	23.0	4.0	17.0	23.0	23.0	1.8	13.0	17.0	23.0	1.8	33.0	7.8	7.8	2.0	21.0	4.0
April	33.0	4.5	170.0	49.0	23.0	4.5	130.0	17.0	22.0	1.8	110.0	17.0	17.0	2.0	70.0	4.0	7.8	1.8	NS	11.0	2.0	1.8	7.8	23.0
March	33.0	33.0	23.0	49.0	11.0	23.0	49.0	31.0	17.0	2.0	17.0	11.0	13.0	4.5	17.0	4.5	2.0	2.0	17.0	22.0	2.0	2.0	17.0	4.5
February	79.0	23.0	540.0	49.0	70.0	31.0	350.0	49.0	79.0	17.0	240.0	11.0	23.0	22.0	240.0	22.0	7.8	2.0	33.0	7.8	6.8	11.0	33.0	11.0
January	17.0	49.0	33.0	49.0	17.0	22.0	33.0	23.0	13.0	33.0	13.0	4.5	23.0	7.8	33.0	4.5	17.0	7.8	7.8	7.8	7.8	7.8	4.5	2.0
** Truncated GeoMetric Mean	36.0	40.0	38.0	39.0	26.0	28.0	30.0	29.0	18.0	18.0	17.0	15.0	15.0	14.0	16.0	14.0	10.0	9.0	9.0	9.0	8.0	9.0	8.0	8.0
** Truncated 90th Percentile	139.0	192.0	211.0	205.0	69.0	91.0	152.0	160.0	58.0	72.0	77.0	77.0	39.0	54.0	71.0	76.0	35.0	41.0	44.0	38.0	33.0	32.0	26.0	28.0

NS = No Sample

SCDHEC Regulatory Requirements:

Geometric Mean ≤ 14

90th Percentile ≤ 43

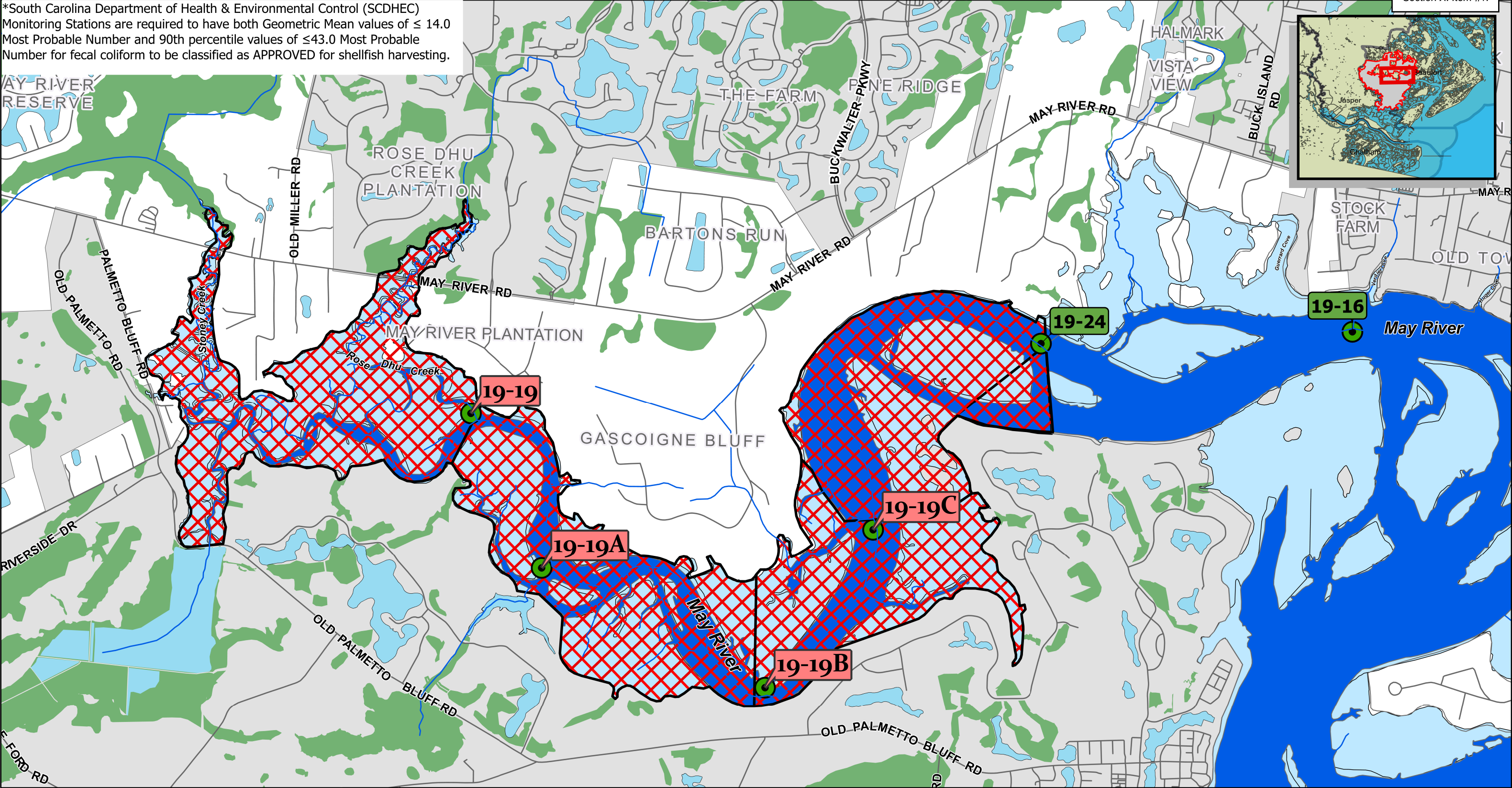
**** Town staff calculations utilizing SCDHEC statistics**

Note:


December 2024 ends the data collection period for 2025 shellfish harvesting season.

2024 fecal coliform data is part of the 2025 classification data collection period.


*South Carolina Department of Health & Environmental Control (SCDHEC)
Monitoring Stations are required to have both Geometric Mean values of ≤ 14.0
Most Probable Number and 90th percentile values of ≤ 43.0 Most Probable
Number for fecal coliform to be classified as APPROVED for shellfish harvesting.




SCDHEC Shellfish Monitoring Stations



Restricted
2022/2023 Shellfish
Season



Open SCDHEC Shellfish
Monitoring Stations



SCDHEC Shellfish Monitoring
Station Classification Change

Streets

Drainage

Town Jurisdiction

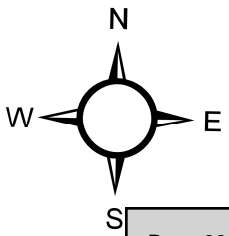
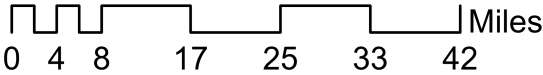
County Jurisdiction

Water

Wetlands

Town of Bluffton
Beaufort County, SC

SCDHEC SHELLFISH HARVESTING STATUS



WAPAC Meeting Presentation
 May River Watershed Action Plan Update & Modeling Report
 Overview and Status
 Created: August 25, 2022
 Updated: May 23, 2024

Overview

- May River Watershed Action Plan Update & Modeling Report **completed** November 2020.
- Town Council Adoption of May River Watershed Action Plan Update as a Supporting Document to the Comprehensive Plan **completed** February 2021.
- May River Watershed Action Plan Update & Modeling Report Summary:
 - **Executive Summary** provides an overview of the project background, findings and interpretation, current state of knowledge concerning fecal coliform fate and transport, and an overview of proposed recommendations for the Town.
 - **1.0 Introduction** includes more detailed project background including the purpose of the document and the Project Team's tasks to 1) develop water quality models to compare current conditions (2018) to pre-shellfish impairment conditions (2002) to develop pollutant load reduction estimates, and 2) evaluate 2011 Action Plan BMPs for appropriateness under current conditions and provide up to eleven (11) alternative projects and preliminary cost estimates.
 - **2.0 Model Setup; 3.0 Model Calibration, and 4.0 Water Quality Model Results** details the methodology used by the Project Team to establish and calibrate the models and the model outputs. This highly technical information is necessary for future Water Quality (WQ) Model calibration and use for consistency.
 - **5.0 Recommendations** includes strategies to improve the Town's monitoring efforts to calibrate the WQ Model further (§5.1), strategies and BMPs for bacteria reduction (§5.2), an evaluation of 2011 Action Plan BMP projects (§5.3), and methodology used to develop 2020 Action Plan Update recommended projects (four septic to sewer conversion projects and eleven stormwater BMP retrofit projects) with cost-estimates and ranking/prioritization (§5.4).
 - **6.0 Conclusions** offers a summary of the WQ Model results in context of current state of knowledge.
 - **7.0 References** documents the prior research findings used to inform recommendations.
 - **Appendices** reference supporting materials:
 - Montie et al. (2019) "Technical Report: Historical Analysis of Water quality, Climate Change Endpoints, and Monitoring in Natural Resources in the May River,"
 - Technical Memo from Dr. Rachel Noble,
 - Watershed Treatment Model Spreadsheets, and
 - Detailed Project Cost Estimate Spreadsheets.

MRWAP 2020 Update Septic to Sewer Project Recommendations/Evaluations:

- Four (4) septic to sewer conversion projects were evaluated in the Rose Dhu Creek and Stoney Creek subwatersheds:
 - Cahill
 - Gascoigne
 - Stoney Creek
 - Pritchardville
 - These projects overlap with 42 subcatchments in the Stoney Creek watershed and 11 in Rose Dhu Creek. Based on WQ Model outputs, these projects alone may potentially reduce FC loading by 3.46×10^{13} FC per year.
- The estimated septic to sewer conversion costs of these projects is \$5.5 million.

Work Performed and Current Status as of August 25, 2022 Meeting

Discussions with the Town, Beaufort County and BJWSA have been held about future Septic to Sewer Program projects identified above. Stoney Creek Septic to Sewer Project has been identified as the next priority project to pursue under the Septic to Sewer Program.

- The Town and Beaufort County are finalizing Funding and Cost share elements relative to the project and a letter to BJWSA will be developed and sent to BJWSA regarding project funding, capital outlay and schedule for implementation.

Update for WAPAC February 23, 2023 Meeting:

The Town, Beaufort County and BJWSA continue to work on details to draft a proposed Inter-Governmental Agreement (IGA) to be presented to each respective approving authority for review, finalization, and approval. It is anticipated that this process is months away from final approval/adoption of the respective parties.

Update for WAPAC July 27, 2023 Meeting:

Stoney Creek/Palmetto Bluff Sewer: Three-party agreement is being finalized by BJWSA legal team now. BJWSA's RFP for water and sewer design services was supposed to close 6/30/23. Due to RIA protocol, they must review and approve an RFP prior to posting, thus the RFP was canceled. BJWSA anticipates receiving RIA approval and reposting the RFP on 7/17/23. BJWSA received RIA approval and reposted the RFP on 7/17/23 with a closing of 8/1/23.

Update for WAPAC January 25, 2024 Meeting:

Stoney Creek/Palmetto Bluff Sewer: All parties agreed to the IGA in October. The IGA will be presented to TC at the November TC meeting for review and approval. Beaufort County will present the IGA at their December meeting.

Update for WAPAC May 23, 2024 Meeting:

Stoney Creek/Palmetto Bluff Sewer: BJWSA is the project manager. Foresight Communications, a marketing/communications group, first community engagement for the project is 5/13/24. A new BJWSA project manager has

been assigned, Beth Lowther. Kim, Mark and Felicia met with Charlie Stone, BJWSA Gov't liaison, and Ashley Goodrich, BJWSA planner, on 5/6/24 to discuss how they might use 319 funding to support future sewer connections. Next partner meeting is 6/13/24 at 9:30am.

MRWAP Update Eleven Impervious Restoration (stormwater retrofit) Project Recommendations/Evaluations:

- Eleven (11) project sites (incorporating various individual BMPs) were selected in consultation with the Town (prioritizing subcatchments with FC bacteria hotspot and/or large impervious areas). These sites were evaluated in terms of the potential benefits gained by retrofitting to meet the 95th percentile storm retention, to the maximum extent possible, under the proposed Impervious Area Restoration/Stormwater Retrofit Program.

Eleven (11) proposed project sites Rose Dhu Creek (6 projects) and Stoney Creek (5 projects):

- Bluffton Early Learning Center (BELC)
- Boys and Girls Club of Bluffton (BGC)
- Benton House (BH)
- Bluffton High School (BHS)
- Buckwalter Recreation Center (BRC)
- Lowcountry Community Church (LCC)
- McCracken Middle School/Bluffton Elementary School (MMSBES)
- May River High School
- One Hampton Lake Apartments (OHLA)
- Pritchardville Elementary School (PES)
- Palmetto Pointe Townes (PPT)
- Based on WQ Model outputs, these projects alone may potentially reduce FC loading by
 - 2.99×10^{14} FC reduction for the Full SWRv (entire sub-basin drainage area catchment).
 - 2.53×10^{14} FC reduction for the Reduced SWRv projects (impervious area drainage area of sub-basin catchment).
- The estimated of Full SWRv projects costs is \$32.7 million and the estimated cost of Reduced SWRv projects is \$22.6 million.
- Currently the Towns' Impervious Restoration Program is targeting Reduced SWRv for future projects.

Example of Impervious Restoration Project evaluation from May River Watershed Action Plan Update & Modeling Report:

May River Watershed Action Plan Update

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Figure 52. McCracken Middle School/Bluffton Elementary School Proposed Stormwater BMP Retrofits

Work Performed and Current Status as of August 25, 2022 Meeting**Update for WAPAC February 23, 2023 Meeting:****Update for WAPAC July 27, 2023 Meeting:**

Work performed for this project is being performed by MSA Consultant Engineering Firm:

- Drafted a detailed scope of work for Engineering Consultant Firm review and cost proposal (Expression of Interest) regarding performance of the work elements presented herein and related to MRWAP Update recommendations for implementation.
- The Expression of Interest was submitted to 3 consultant firms under existing Master Service Agreements with the Town for review and a request for response.
- All 3 Firms responded and their respective responses were evaluated, scored and discussed internally.
- A recommendation for Award was made and the Consulting Firm of Goodwyn, Mills and Cawood selected.
 - Phase I of this work performed under existing FY 22 funding from Watershed Management Division.
 - Phase II of this work be presented for Town Council review and approval in the August 2022 Town Council Meeting and FY23 funding.

Update for WAPAC February 23, 2023 Meeting:

Phase II work was approved by Town Council and work has been initiated and reported herein. **This Task Completed**

Task 1 : MRWAP Update 11 site locations

Update for WAPAC July 27, 2023 Meeting:**Update for WAPAC January 25, 2024 Meeting:**

Eleven (11) proposed project sites Rose Dhu Creek (6 projects) and Stoney Creek (5 projects):
Yellow and **Blue** highlight indicates **geotechnical evaluations complete**.

- **Bluffton Early Learning Center (BELC)**. Participating in preliminary design development phase.
- **Boys and Girls Club of Bluffton (BGC)**. Participating in preliminary design development phase.
- **Benton House (BH)**. Participating in preliminary design development phase.
- **Bluffton High School (BHS)**. Participating in preliminary design development phase.
- **Buckwalter Recreation Center (BRC)**. Participating in preliminary design development phase.
- ~~Lowcountry Community Church (LCC).~~ **Declined to Participate.**
- **McCracken Middle School/Bluffton Elementary School (MMSBES)**. Participating in preliminary design development phase.
- **May River High School**. Participating in preliminary design development phase.
- ~~One Hampton Lake Apartments (OHLA).~~ **Declined to Participate.**
- **Pritchardville Elementary School (PES)**. Participating in preliminary design development phase.
- ~~Palmetto Pointe Townes (PPT).~~ **Declined to Participate.**
- Evaluate 11 sites and proposed BMPs. **Complete.**
- Update concept plans for 11 sites based on site evaluations, recommendations and discussions. **Complete.**
- Perform geotechnical evaluations at each site at locations related to BMP locations of updated concept plans. **Completed for the 5 school sites.** Geotechnical evaluations for the remaining **3** participating partner sites are being schedule based on recent property owner participation status being known/confirmed.
 Coordinating geotechnical work approval with property owners and schedule for Benton House (BH), Buckwalter Recreation Center (BRC) and Boys and Girls Club of Bluffton (BGC). Geotechnical field work for Benton House (BH), Buckwalter Recreation Center (BRC) and Boys and Girls Club of Bluffton (BGC) completed and data being analyzed and geotechnical report in development.
All geotechnical work and reports completed.
- Refine updated concepts and use for presentations to Property Owner to discuss Impervious Restoration Program goals, objectives and gain support for Program and their participation.

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Based on geotechnical investigation results, updated Concept plans for the 5 school sites have been refined. A meeting will be scheduled with School District to discuss the **updated** concept plans to get their feedback prior to beginning Preliminary Design task. Based on geotechnical investigation results, updated Concept plans for Benton House (BH), Buckwalter Recreation Center (BRC) and Boys and Girls Club of Bluffton (BGC) sites will be refined. A meeting will be scheduled with School District to discuss the updated concept plans to get their feedback prior to beginning Preliminary Design task.

Field review meetings held March 28 and April 15, 2024 at each of the 9 participating sites. Meeting outcome was to review proposed BMPs and location to assess and rank BMP feasibility and cost/benefit. Based on discussions and field review Preliminary Design has been initiated.

- Develop list of “incentives” to secure Property Owner participation (**see Policy Document Formulation below**).
- Based on geotechnical information and Property Owner feedback further refine concept plans to Preliminary Design :
 - Determine BMP types and location to maximize SWRv/WQ treatment in cost effective approach. **Estimated impervious area treated and SWrv capture based on refined Concept plans developed for the 5 school sites.**
 - Determine estimated pollutant load reductions.
 - Develop site specific BMP details.
 - Develop preliminary BMP maintenance schedule and cost for each site.
- Preliminary Design development plans will be presented to the Property Owner for review and discussion. Other Restoration Program details (maintenance responsibilities, easements, incentives, etc.) developed as part of the Program (see Policy Document Formulation below) will also be discussed in hopes of establishing a commitment from the Property Owner to participate in the Program. Once a “commitment” is secured from the Property Owner, the project site will be moved to Final design, permitting, and ultimately construction. A meeting was held with School District on September 28, 2023 to discuss initial Preliminary Design development. Comments were noted and to be incorporated for final preliminary design plan development.

Based on field review Preliminary Design has been initiated.

Task 2 : Identify 15 new project sites for Town of Bluffton Impervious Restoration/BMP Retrofit Projects.

- The Town wishes to identify an additional 15 project sites located within the municipal limits of Bluffton for the Impervious Restoration/BMP Retrofit Program.. However, the criteria for site selection will be considered to be more “low hanging fruit” based on the following:
 - Within Town of Bluffton Municipal limits.
 - Soils – sandy soils with high infiltration rates offer the biggest bang for the buck for water quality treatment/improvement. Utilizing soil survey and other information target sites where infiltration can be maximized on-site.
 - Public or governmental agency land/property owner (not SCDOT RoW).

Update for WAPAC February 23, 2023 Meeting:

Desktop analysis and field work performed to develop a list of 45 sites that potentially meet the criteria above. This list of potential sites is under review/evaluation.

Update for WAPAC July 27, 2023 Meeting:

Finalized the list of 15 additional sites (and 5 alternates) to be considered/evaluated within the municipal limits of Bluffton for Impervious Restoration feasibility and concept plan development. Site evaluations will be performed as property owner approvals for access to property to perform site assessment is obtained.

Update for WAPAC May 23, 2024 Meeting:

Data search for these sites is ongoing in terms of existing plan information, current property owner and contacts.

Yellow Highlight indicate field investigations, drainage pattern evaluations and hand auger soil samples completed.

Green Highlight indicate contact made and coordination in process.

Initial concept plans are being developed for these sites for review. Other site evaluations will be performed as property owner approvals for access to property to perform site assessment is obtained.

- **Dominion Energy Engineering Office**
- **Rose Dhu Equestrian Center**
- **St. Gregory Catholic Church/School**
- **River Ridge Academy**
- **MC Riley Early Childhood Center**
- **MC Riley Elementary School**
- **MC Riley Sports Complex**
- **Bluffton Middle School**
- **Red Cedar Elementary School**
- ~~Seagrass Station Road Site~~ determined to be not feasible, low cost/benefit.
- **Bluffton Pkwy West (170 to Buckwalter)**
- **Buckwalter Pkwy (Hampton Hall to May River Road)**
- **Persimmon St/Sheridan Park Cir/Pennington Dr**
- **Vaden Nissan Hilton Head**
- ~~NHC Healthcare/Bluffton (Healthcare, Rehab, Assisted Living)~~ Declined to participate

Town of Bluffton Impervious Restoration/BMP Retrofit Policy Documents.

Task 3 : Section 5.4.4. Stormwater BMP Retrofit Projects of the May River Watershed Action Plan Update and Model Report identifies potential Impervious Restoration/BMP Retrofit projects located on Public and Private Land. As mentioned earlier, one of the primary site selection criteria, at time of report development, was to identify sites with large impervious areas so that pollutant load reductions could be estimated and the benefits of such projects on stormwater quality quantified/estimated, if implemented into construction. Generally, Public Funds are not expended to improve private property

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nor is Town of Bluffton funding generally expended on Public Land owned by another government entity. In order for such projects identified in Section 5.4.4. to move forward in the interest of improved water quality and for the overall benefit and welfare of the constituents of the Town of Bluffton, Policy Documents need to be formulated that establishes the parameters of such a Program to be initiated and implemented.

- Policy Document Formulation has been initiated and includes research of similar Programs Nationwide.

Update for WAPAC February 23, 2023 Meeting:

2 *DRAFT* Policy Documents have been submitted for review and comment.

Comments are being evaluated and addressed by consultant and an update *DRAFT* Policy Document is expected by April 2023.

Update for WAPAC July 27, 2023 Meeting:

- Updated Draft Policy Document was completed and submitted in June for review and comments are being finalized.
- Upon Policy Document Final Draft development, the Policy Document will be presented to WAPAC with a request for recommendation to Town Council for adoption.

Update for WAPAC January 25, 2024 Meeting:

- Internal review, discussion and comments of Updated Draft Policy Document was completed and submitted to Consultant September 10, 2023. Initial discussion of comments and path forward held November 3, 2023 with Consultant. Additional discussions with Consultant to be held.

Update for WAPAC May 23, 2024 Meeting:

- **Based on review of content of the updated *DRAFT* Policy Document, The Town directed the document be organized into the following categories:**
 - **Enterprise Fund & Fee-in-Lieu Program – work on this section has been initiated.**
 - **ToB CIP Project Impervious Restoration Program & incentives**
 - **ToB SWrv Credit Trading Program (under evaluation)**

Other, Related MRWAP Update Recommendations

- Adopt proposed regional Southern Lowcountry Post Construction Stormwater Ordinance and Design Manual - **complete** September 2021.
- The Town should incorporate volume reduction BMPs (those that encourage infiltration) within existing and future CIP projects to the maximum extent practical, especially for project locations with well-drained soils (HSG A or B) – **in progress**, see below.
 - **Work Performed and Current Status as of August 25, 2022 Meeting**
 - Bridge Street Streetscape Project
 - Project design/permitting is complete, and Construction Contract has been awarded.

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- Incorporated Infiltration BMPs within the project to capture and treat 1.95" of rainfall over impervious surfaces within the project area, prior to discharge into the May River.
- Received Section 319 Grant from DHEC to cost-share cost of construction of proposed BMPs.

Update for WAPAC February 23, 2023 Meeting

Construction was initiated by JS Construction in early December 2022.

Construction considered 65% complete.

Update for WAPAC July 27, 2023 Meeting:

- Project work is Substantially Complete.
- Partial reimbursement from DHEC for construction cost supported by 319 Grant requested and received.

Update for WAPAC January 25, 2024 Meeting

- Project and Grant work is complete and closed out.
- Total Grant funding for this project \$228,165.15
- Water Quality Monitoring Results

Water Quality Monitoring Summary: Based on monitoring and rainfall data for the period of July 1-October 11, 2023, the only rainfall event that produced a stormwater outfall/discharge was an intense rain event on September 10, 2023 which produced 3.82" of rain in a 4 hour period. The next most intense storm happened on July 10, 2023 which produced 1.46" of rain in 1 hour and no stormwater outfall/discharge occurred. Based on this data, we estimate the BMP treatment train constructed with this project could accommodate a 10 year storm event (6.9" of rain in 24 hours) with little or zero runoff. Zero runoff equals zero pollutants, and zero freshwater being discharged to Huger Cove and the May River.

From 319 Grant Project Final Report: Pre-construction water quality monitoring was performed on October 19, 2022, which can be found in **Appendix C**. So, **prior to project construction** a simulated rain event was performed to provide an indication of the amount of rainfall prior to direct a discharge occurring into Heyward Cove and then water samples were collected and tested by USCB to determine pollutants present and their concentrations. The rainfall simulation was performed because there was no way to get a water sample once stormwater entered the BMP and was treated by BMP via infiltration into ground.

Table 1 below is the Pre Construction Water Quality Monitoring Table of Pollutants:

Date	Time of Sample	TKN (mg/L)	Nitrate/Nitrite (mg/L)	Total Nitrogen (TN)	Total Phosphorus (TP)	TSS (mg/L)
10/19/2022	9:41	0.85	0.290	1.10	0.68	220.00

Three underground storage/infiltration and four pervious paver parking areas with underground storage were installed. After the completion of the BMPs, water quality monitoring was conducted to determine the reduction in pollutants with the newly installed BMPs. The installation of the Auto samplers were located at the two stormwater pipe outfalls into Heyward Cove, FES-1 and FES-2. Post-construction water

quality monitoring occurred on September 11, 2023, which can be found in **Appendix C**. Based off the post-construction pollutant values, all values analyzed were reduced greatly, including TSS.

Table 2 below is the Post Construction Water Quality Monitoring Table of Reduced Pollutants:

Date	Time of Sample	TKN (mg/L)	Nitrate/Nitrite (mg/L)	Total Nitrogen (TN)	Total Phosphorus (TP)	TSS (mg/L)
9/11/2023	16:46	0.64	0.14	0.78	0.19	8.4

Rainfall monitoring took place between July 1, 2023, and October 11, 2023, at the Watershed Building Office, 1261 May River Road. There were eight rainstorm events that had over an inch of water in 24 hours. In particular, there was one rainstorm on September 10th, 2023, where there was 3.82 inches of rain over the extent of four hours. This was the only recorded rain event, during the monitoring period, which produced a discharge of stormwater runoff into outfall FES-2 at Heyward Cove.

Table 3 below are the eight storm events over an inch.

Rainstorms over and inch	
Rainstorm Event	Rainfall (in)
July 5th	1.46 inches over 1 hour
July 10th	1.17 inches over 7 hours
July 28 th	1.28 inches over the whole day
August 28 th	1.23 inches over 1 hour
August 30 th	1.23 inches over the whole day
September 1 st	1.1 inches over 3 hours
September 10 th	3.82 inches over 4 hours
September 17 th	1.09 inches over 6.5 hours

Table 4 shows the monthly rain mounts in inches, with October only accounting for the first eleven days of the month and then monitoring stopped.

Monthly Rain Amounts	
Month	Rainfall (in)
July	7.35
August	5.3
September	7.56
October*	0.0
TOTAL	20.21

*only accounted for October 1 – October 11, 2023

There are many benefits that come from the constructed/installed stormwater best management practices, that include: 1) reducing the concentrations of pollutants that are associated with stormwater runoff, 2) the amount and frequency of direct stormwater/freshwater discharges into Heyward Cove has greatly reduced. and 3) temporarily detain large portions of the runoff volume and then release it a slower rate to decrease the amount of flooding on the roads. With the BMPs that were used for Bridge Street Streetscape, the BMP benefits include the decrease in TSS and other pollutants, but also retrofitting the existing area that had no prior stormwater management in the surrounding area.

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Update for WAPAC May 23, 2024 Meeting

No stormwater outfall condition has been observed since the September 10, 2023 rain event.

- Pritchard Street Drainage Improvement Project
 - Project in Design Phase and considered 30% complete.
 - Incorporated Infiltration BMPs within the project to capture and treat 1.95" of rainfall over impervious surfaces within the project area, prior to discharge into Heyward Cove.
 - Submitted Section 319 Grant proposal to DHEC to cost-share cost of construction of proposed BMPs. Pre-proposal was accepted, and Full Proposal was requested by DHEC. Under Review.
 - Update for WAPAC February 23, 2023 Meeting**
 - 70% design plan submitted, reviewed and comments presented to consultant.
 - 319 Grant was awarded by DHEC to the Town.
 - **Update for WAPAC July 27, 2023 Meeting:**
 - Project Scope of Work and budget increase approved for FY24 to include streetscape elements of lighting, sidewalk, traffic calming and ADA compliance.
 - Updated survey received.
 - Updated 70% design drawings received in July and under review.
 - **Update for WAPAC January 25, 2024 Meeting**
 - Updated 70% Streetscape Design submittal made and review comments provided to Consultant for 90% Design development and permit acquisitions.
 - Pre-Application meeting for Project held with Growth Management and Stormwater Management.
 - **Update for WAPAC May 23, 2024 Meeting**
 - **95% Design Submittal received February 29, 2024.**
 - **Public Project DRC meeting held April 3, 2024. Internal review comments completed and Design update in process.**
- In-House Microbial Source Tracking – in progress, see below
 - The Town entered a Memorandum of Understanding (MOU) with the University of South Carolina Beaufort (USCB) in July 2021 to establish and fund a regional Microbial Source Tracking (MST) laboratory capable of accepting environmental water quality samples.
 - Analytical services are provided by the USCB-MST laboratory for all environmental samples collected by the Town.
 - **Update for WAPAC February 23, 2023 Meeting** Staff has collected additional fecal samples needed for dog, bird, and deer. The USCB-MST Laboratory is conducting the

May River Watershed Action Plan Update

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assessment on additional fecal samples and Dr. Pettay will provide a final report to the Town once all fecal markers in regional watersheds have been analyzed.

- **Update for WAPAC July 27, 2023 Meeting:** Additional genetic fecal markers continue to be analyzed by Dr. Pettay and the MST Laboratory.
- **Update for WAPAC January 25, 2024 Meeting:** Dr. Pettay is now the Lead Principal Investigator (PI) for both the MST and Water Quality Laboratories. Dr. Pettay, Town staff, and County staff met to discuss regional water quality monitoring needs. The MST Laboratory is still processing scat samples, and a final report is forthcoming.
- **Update for WAPAC May 23, 2024 Meeting: The MST Laboratory has finalized processing scat samples. Dr. Pettay will be providing a final report/update to the Town.**
- Future (new) Bacteria Monitoring Locations - in progress, see below
 - Staff increased sampling frequency and implemented additional monitoring sites and parameters in the May River headwaters based upon recommendations in the 2020 May River Watershed Action Plan Update and Model Report.
 - **Update for WAPAC February 23, 2023 Meeting:** Staff is collecting intermittent flow data at SonTek IQ sites in conjunction with grab FIB samples.
 - **Update for WAPAC July 27, 2023 Meeting:** Staff is working with the consultant to identify recommended strategies for intermittent flow data collection and a review of the Town's FIB grab sample schedule.
 - **Update for WAPAC January 25, Meeting:** Staff continues to collect MRWAP bacteria grab samples twice per month at fourteen (14) monitoring locations in the May River headwaters study area. Intermittent flow measurements are collected at six (6) of these monitoring locations at the time of grab sampling.
 - **Update for WAPAC May 23, Meeting: Staff continues to collect MRWAP bacteria grab samples twice per month at fourteen (14) monitoring locations in the May River headwaters study area. Intermittent flow measurements are collected at five (5) of these monitoring locations at the time of grab sampling. The goal has been to collect grab samples following wet weather conditions to the maximum extent practicable. WEC has further defined wet weather as samples collected within 24-hours of ≥ 0.50 inches of rainfall. All Town grab samples are analyzed by the USCB Water Quality Laboratory.**
- Future (new) Water Flow Monitoring Locations.
 - **Work Performed and Current Status as of August 25, 2022 Meeting**
 - The MRWAP Update included recommendations for the Town to perform certain rainfall and flow data measurements in May River Headwater Watersheds in order to "calibrate" and make more accurate Model predictions. These recommendations were evaluated and a game plan to address recommendations to calibrate model developed.
 - Utilizing existing flow and rainfall data collected over past years with rain gauges, IQ Plus and Sontek measuring instruments in Stoney Creek, Rose Dhu Creek, Palmetto Bluff, Duck Pond and Heyward Cove, the Town hired a consultant to review the data and determine:

May River Watershed Action Plan Update

Updated: May 23, 2024

Next Update: September 26, 2024

- Useful data obtained to gain the required information to calibrate model.
 - The data obtained from Stoney Creek and Heyward Cove was deemed sufficient for Model calibration and Final report for this work is in process.
 - Duck Pond was deemed inconsequential, not needed due to drainage area size and proximity/outfall to tidal waters.

Update for WAPAC February 23, 2023 Meeting

- Consultant Final Report delivered, and Model Calibration Data for Stoney Creek and Heyward Cove identified.
- If data review resulted in insufficient data, develop a monitoring program that would produce the data needed.
 - Rose Dhu Creek and Palmetto Bluff flow data review resulted in data that was insufficient to calibrate Model.
 - Final report identifying recommended strategies to gain required data is in process.
 - Potential purchase of telemetry stations to equip continuous flow monitoring stations with real-time data access.

Update for WAPAC February 23, 2023 Meeting

- Final Report delivered. Based on recommendations of data and process needed, staff has procured needed telemetry station equipment and has hired a consultant to assist in getting the intermittent and continuous flow data and producing a Final Report. The fieldwork installation of equipment is scheduled. Once installed and operational, data collection will last 6 months.

Update for WAPAC July 27, 2023 Meeting

- The Town of Bluffton procured and installed two (2) SonTek Turnkey Systems that enable real-time continuous flow data review to a cloud-based service. These systems are deployed in the Rose Dhu Creek and Palmetto Bluff subwatersheds.
- A SonTek IQ remains deployed in the Stoney Creek subwatershed. The consultant's first data review determined there was sufficient flow data for model calibration in the Stoney Creek subwatershed. However, staff determined it would continue to collect continuous flow data at this location so that continuous flow, intermittent flow,

May River Watershed Action Plan Update

Updated: May 23, 2024

Next Update: September 26, 2024

bacteria samples, and rainfall data were collected for three (3) of the four (4) Modeling Report subwatersheds simultaneously.

- Consultant is reviewing data and identifying power, beam, or possible maintenance issues weekly.
- Intermittent flow measurements, utilizing the FlowTracker2, will be conducted at the time of grab sampling at the three (3) SonTek IQ flow stations beginning 7/31/23.

Update for WAPAC January 25, 2024 Meeting:

- Staff continue to operate and maintain three (3) SonTek IQ continuous flow monitoring stations in the May River headwaters. Staff expect these systems to be in place for approximately one (1) full year to account for seasonality.
- The Duck Pond subwatershed has no channelized flow entering or exiting the system. The Town's consultant suggested that the Town monitor water elevation in the Duck Pond for approximately 6 months to ensure water elevations are accurately depicted by future modeling. Staff has requested permission to site a water elevation logger in the Duck Pond, near or attached to the Palmetto Bluff bridge.
- Clarification from the consultant determined that due to limited staff time, intermittent flow measurements would be most valuable at six (6) of the Town's water quality monitoring locations upstream of the SonTek IQ flow stations.
- Staff is working diligently to collect samples following wet weather conditions which have been defined as ≥ 0.50 inches of rainfall within 24 hours of sampling. The USCB Water Quality Laboratory has been assisting the Town with ensuring samples can be analyzed on short notice.

Update for WAPAC May 23, 2024 Meeting:

- **Dr. Pettay continues as the Lead Principal Investigator (PI) for both the USCB-MST and Water Quality Laboratories. The MST Laboratory has finalized processing scat samples, and a final report is forthcoming.**

May River Watershed Action Plan Update

Updated: May 23, 2024

Next Update: September 26, 2024

- **Staff continue to operate and maintain three (3) SonTek IQ continuous flow monitoring stations in the May River headwaters.**
 - In FY23, the Town and its consultant determined it did not have sufficient data for the Rose Dhu Creek and Palmetto Bluff subwatersheds for model calibration. In April 2023, the Rose Dhu Creek and Palmetto Bluff SonTek-IQ Plus instruments, were installed and/or upgraded with Turnkey/Cloud-based Systems.
 - The Stoney Creek subwatershed SonTek IQ-Plus has operated almost continuously for two (2) full years. In FY23, the Town understood it had enough quality continuous and intermittent flow data for this subwatershed, so the SonTek-IQ Plus instrument was not upgraded with Turnkey/Cloud-based Systems. However, staff continued with continuous flow data collection (downloading data manually) efforts in conjunction with the Rose Dhu Creek and Palmetto Bluff subwatersheds.
 - Water Environmental Consultants (WEC) has been conducting a weekly review of all continuous and intermittent flow data collected since The Town's Turnkey/Cloud-based Systems were implemented in April 2023. In April 2024, the one (1) full year of data collection ended. This data collection period allowed the Town to account for seasonality. WEC will provide final reports detailing these three (3) subwatersheds continuous and intermittent flow data for stormwater model calibration. These reports are expected to be received in FY25 for the Rose Dhu Creek, Stoney Creek, and Palmetto Bluff subwatersheds.
- The Duck Pond subwatershed has no channelized flow entering or exiting the system. The Town's consultant suggested that the Town monitor water elevation in the Duck Pond for approximately 6 months to ensure water elevations are accurately

May River Watershed Action Plan Update

Updated: May 23, 2024

Next Update: September 26, 2024

depicted by future modeling. Staff has requested and received permission to site a water elevation logger in the Duck Pond, near or attached to the Palmetto Bluff bridge. This work is anticipated to commence July 2024 (Start of FY25).

- Staff are working diligently to collect samples following wet weather conditions which have been WEC further defined wet weather as samples collected within 24-hours of ≥ 0.50 inches of rainfall. The USCB Water Quality Laboratory has been assisting the Town with ensuring samples can be analyzed on short notice.
- The Town has been operating two (2) weather stations to collect local rainfall data in the May River Watershed. One weather station is located at the Town's Watershed Management Division Office and the other is located at the Town's Police Department Building. This data has been shared with WEC for inclusion in final reports.
- The Town collects tidal elevation data utilizing a HOBO-U20 at the Calhoun Street Dock in Bluffton. WEC deployed two (2) headwater tidal elevation instruments on docks near the Rose Dhu Creek and Stoney Creek subwatershed model boundaries. This study was conducted for a period of 4-weeks to establish the relationship between the tidal amplitude and timing in the headwaters of the May River and the long-term tide gauge operated by the Town at the Calhoun Street dock. The outcomes of this study will be included in WEC's final reports.



May River Watershed Action Plan Advisory Committee Meeting

Thursday, May 23, 2024 at 3:00 PM

The Rotary Community Center at Oscar Frazier Park, 11 Recreation Ct, Bluffton, SC

AGENDA

I. CALL TO ORDER

II. ROLL CALL

III. ADOPTION OF MINUTES

1. Adoption of the March 28, 2024, Minutes

IV. PRESENTATIONS, CELEBRATIONS, AND RECOGNITIONS

1. May River Watershed Action Plan Project Implementation Status Report - Dan Rybak, Project Manager

V. PUBLIC COMMENT

VI. OLD BUSINESS

1. Progress Report on the May River Watershed Baseline Assessment - Beth Lewis, Water Quality Program Manager

VII. NEW BUSINESS

VIII. DISCUSSION

1. Development of Strategic Plan Priority Ten (10) to complete a third-party assessment in FY24 of the stormwater regulations and Design Manual in the Unified Development Ordinance, particularly the Better Site Design element, to ensure intended outcomes are being met and modify the regulations if necessary - Andrea Moreno, MS4 Program Manager

IX. ADJOURNMENT

NEXT MEETING DATE: June 27, 2024

“FOIA Compliance – Public notification of this meeting has been published and posted in compliance with the Freedom of Information Act and the Town of Bluffton policies.”

In accordance with the requirements of Title II of the Americans with Disabilities Act of 1990 ("ADA"), the Town of Bluffton will not discriminate against qualified individuals with disabilities on the basis of disability in its services, programs, or activities. The Town of Bluffton Council Chambers are ADA compatible. Auditory accommodations are available. Any person requiring further accommodation should contact the Town of Bluffton ADA Coordinator at 843.706.4500 or adacoordinator@townofbluffton.com as soon as possible but no later than 48 hours before the scheduled event.

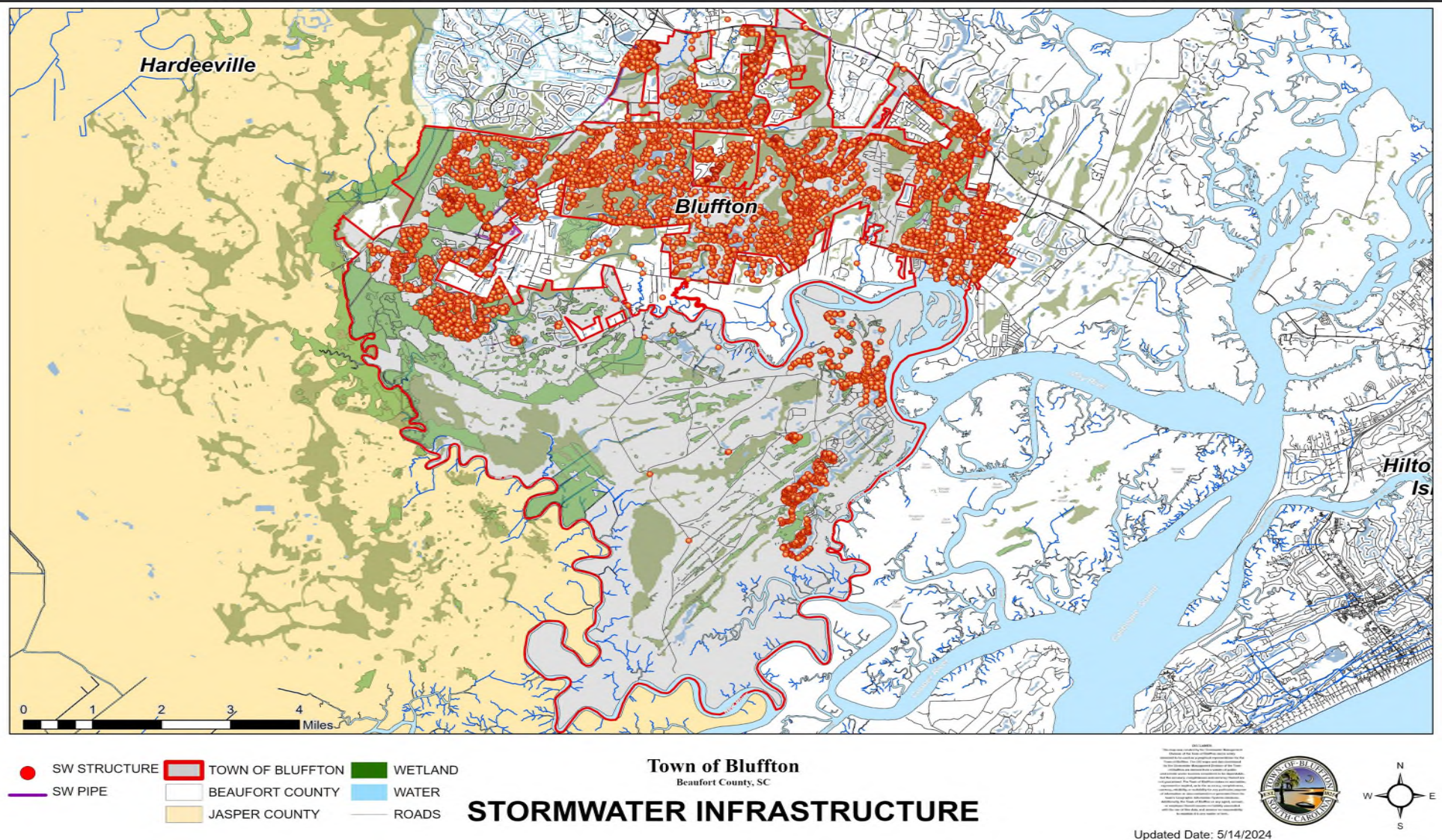
Executive Session – The public body may vote to go into executive session for any item identified for action on the agenda.

**Please note that each member of the public may speak at one public comment session and a form must be filled out and given to the Town Clerk. To submit a public comment online, please click here:*

<https://www.townofbluffton.sc.gov/FormCenter/Town-15/Public-Comment-60>

Public comment is limited to 3 minutes per speaker.

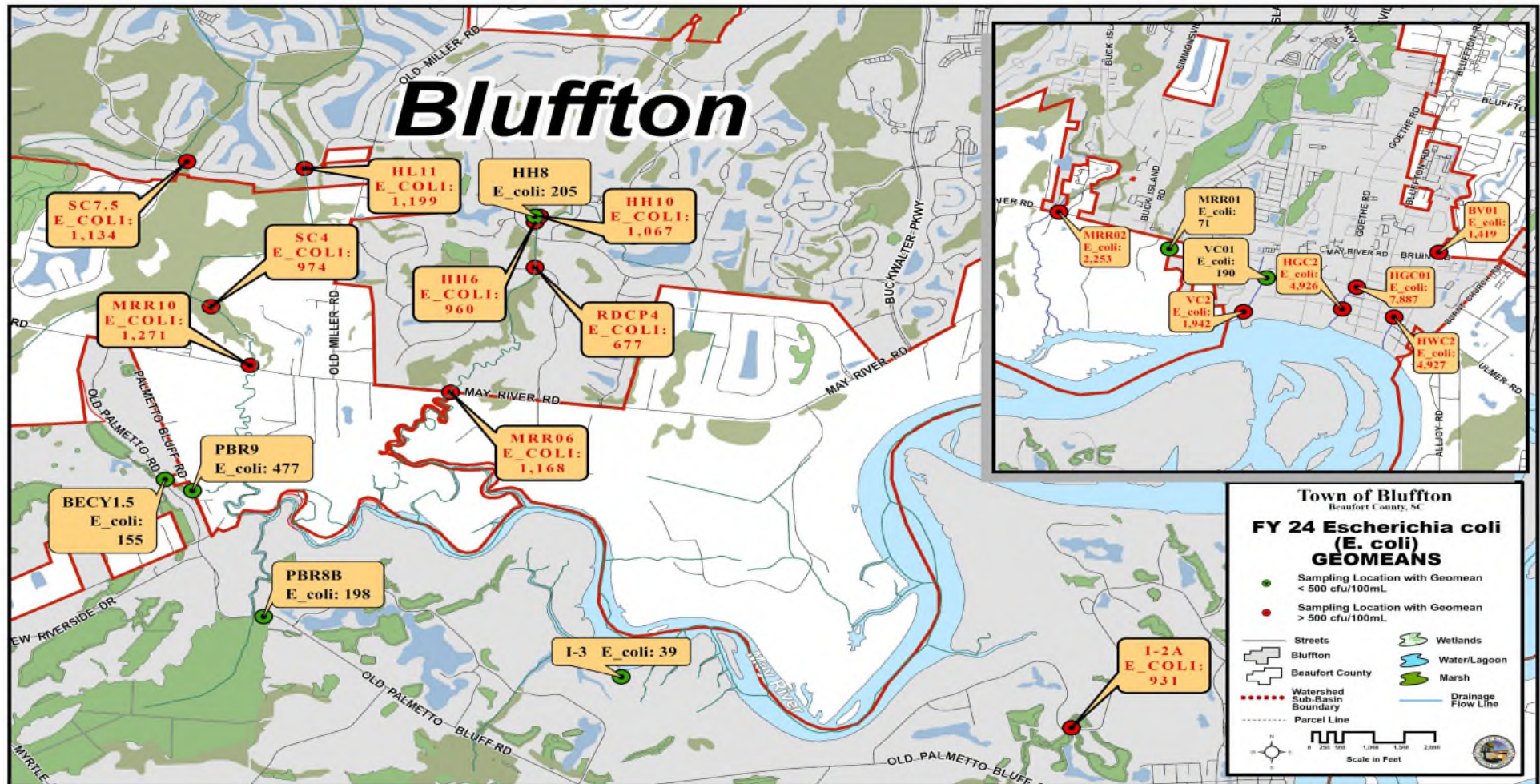
MS4 Minimum Control Measure #3 – IDDE (Illicit Discharge Detection & Elimination): Stormwater Infrastructure Inventory



Stormwater Infrastructure Inventory Collection Status

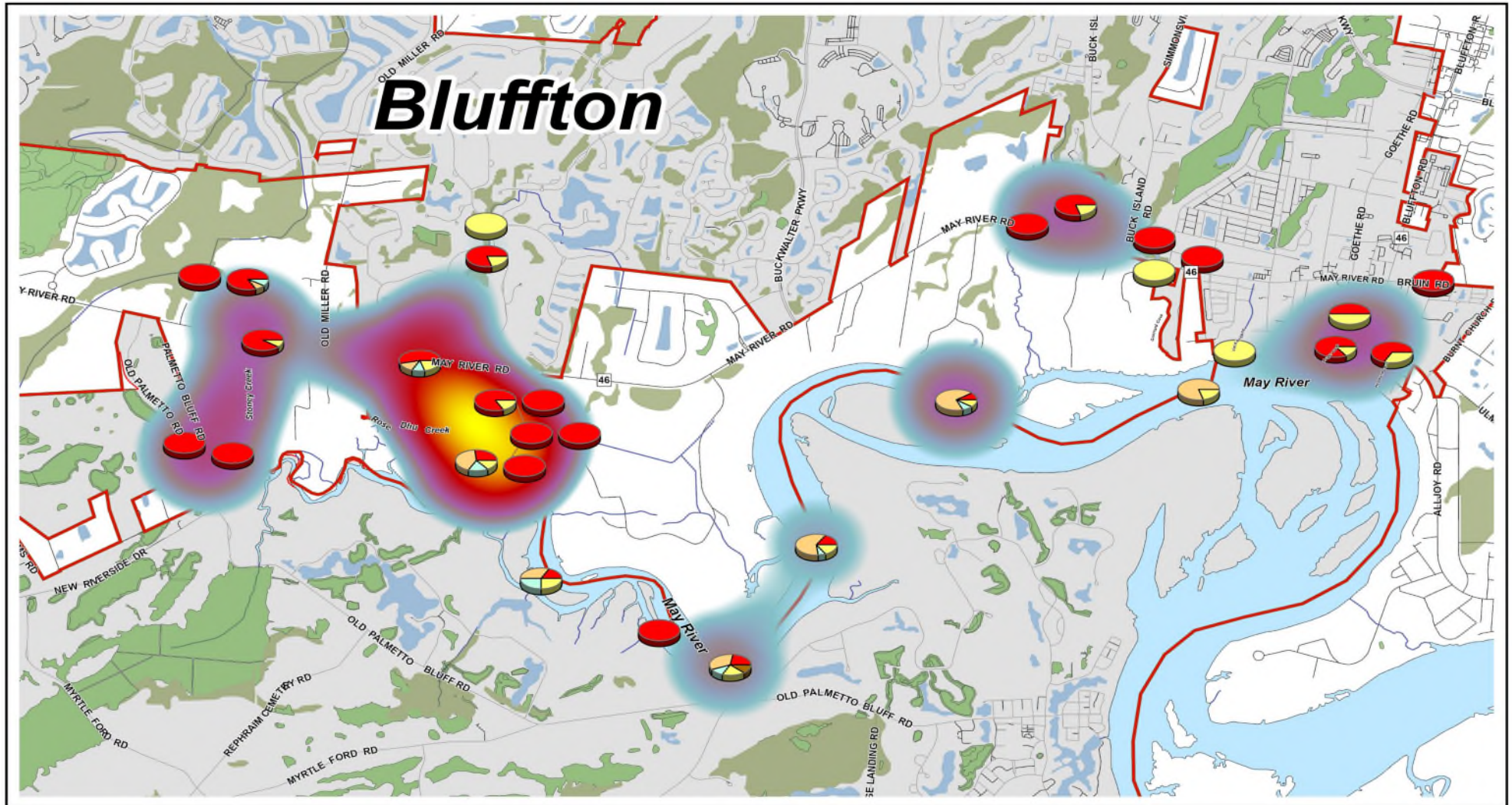
Collection Totals	17,234
FY 2024 YTD	577

MS4 Minimum Control Measure #3 – IDDE: *E. coli* Concentrations Trend Map

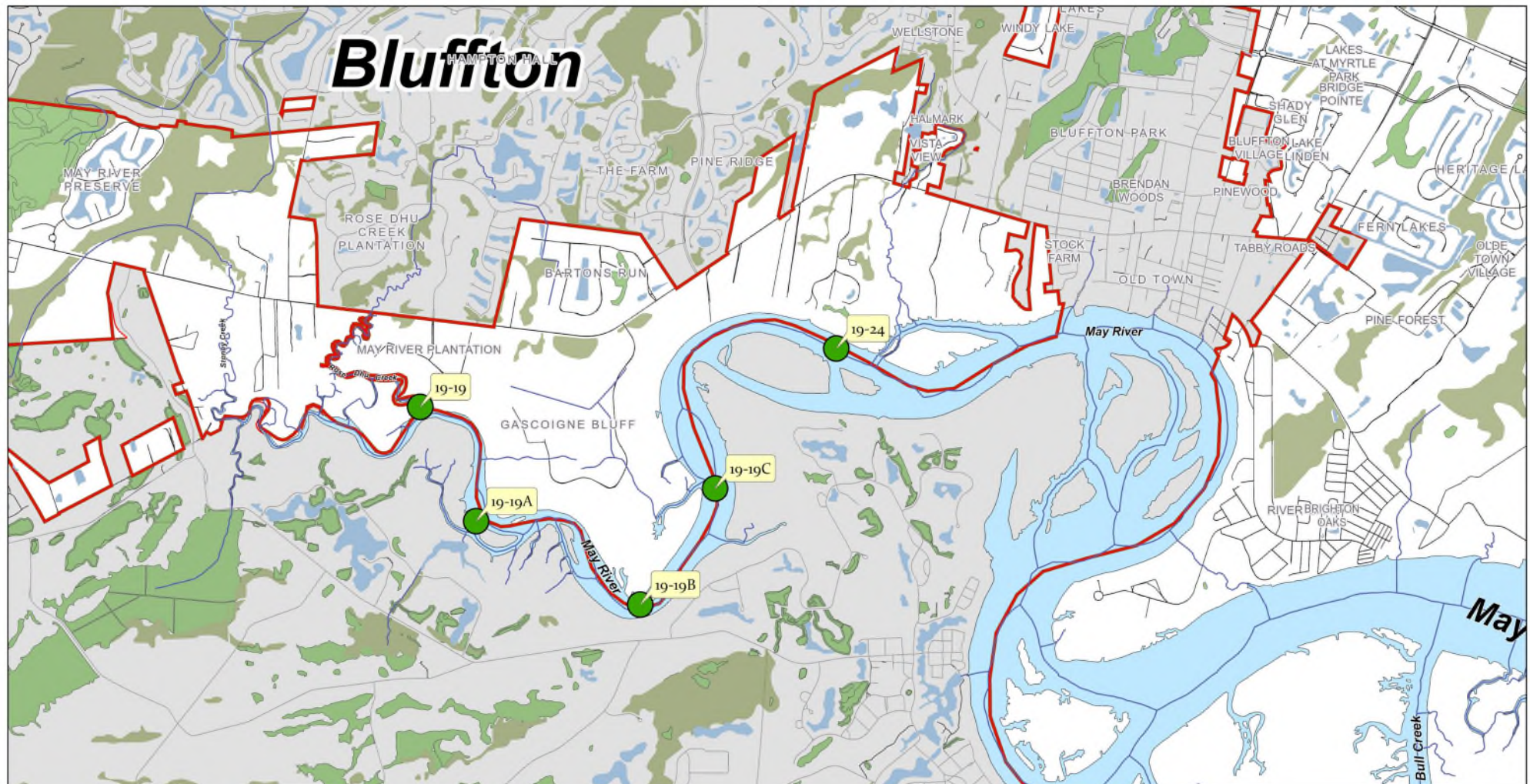


	USCB Water Quality Samples	Microbial Source Tracking Samples	MS4 Quarterly Samples Collected
FY 2024 YTD Totals	620	62	209
FY 2023 Totals	584	108	108
FY 2022 Totals	447	78	119

MS4 Minimum Control Measure #3 – IDDE: Microbial Source Tracking (MST) Trend Map



MS4 Minimum Control Measure #3 – IDDE: Microbial Source Tracking (MST) Map – Human Sources

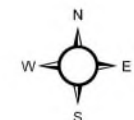


- MST Sampling Location Without Human Genetic Marker Detection
- MST Sampling Location With Human Genetic Marker Detection
- Flowline
- Street
- Town Jurisdiction
- County Jurisdiction

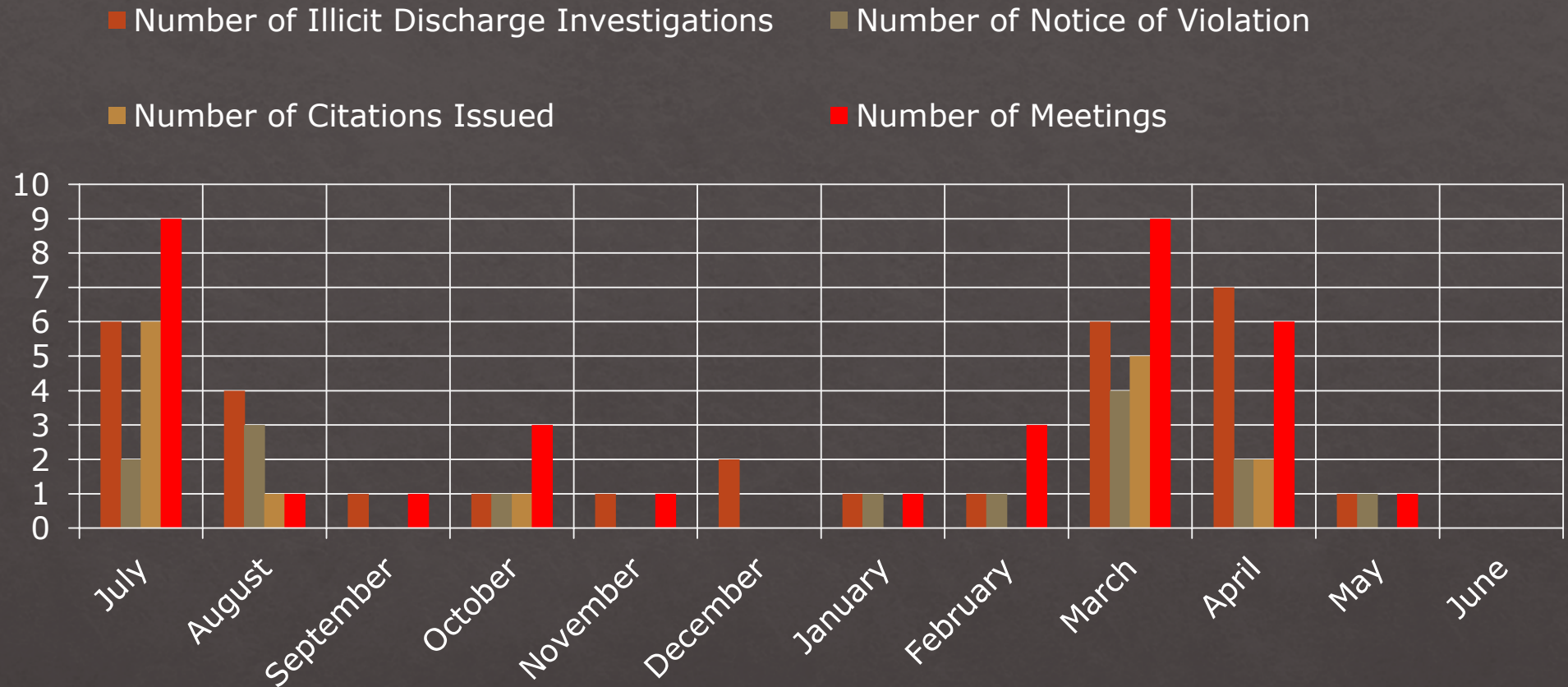
MICROBIAL SOURCE TRACKING LOCATIONS

Sampling Results May 1, 2024 DHEC Sampling

Town of Bluffton
Beaufort County, SC



MS4 Minimum Control Measure #3 – IDDE: Illicit Discharge Investigations



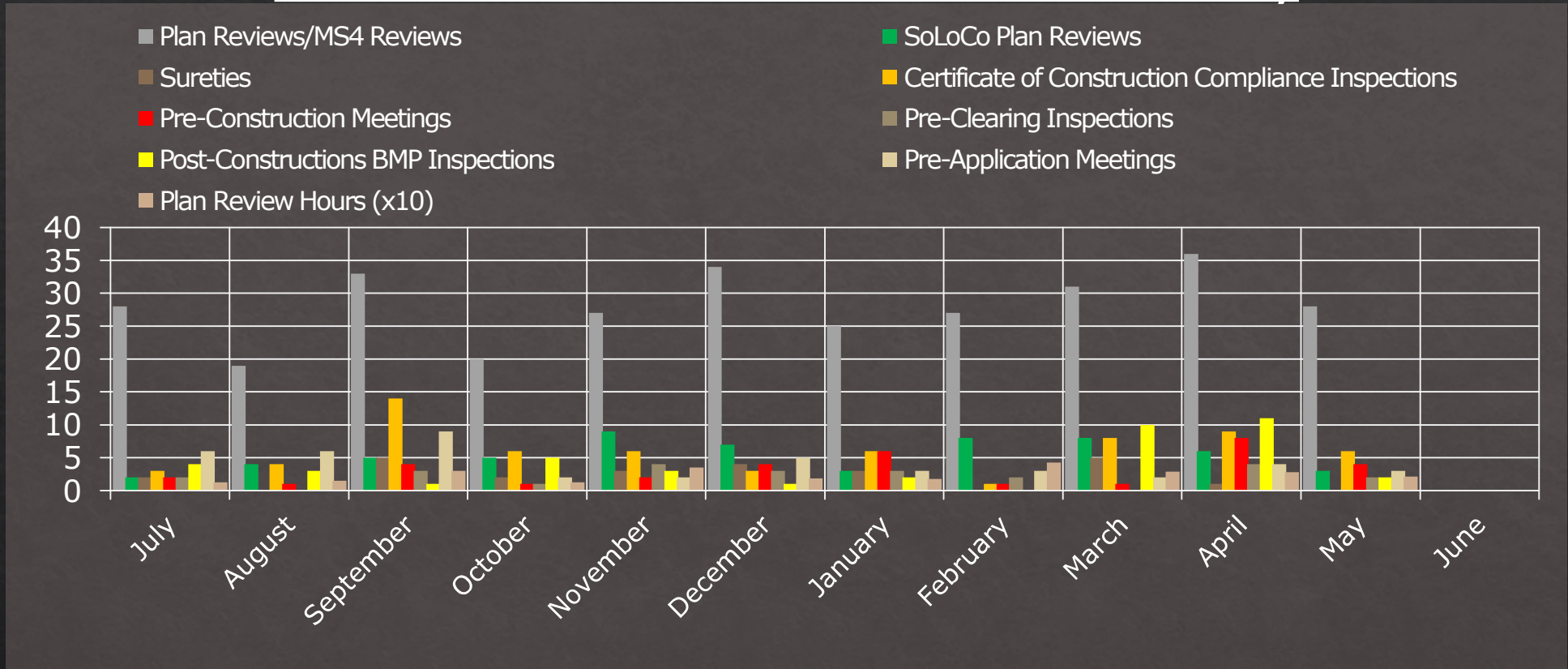
	Number of Illicit Discharge Investigations	Number of Notices of Violation Issued	Number of Citations Issued	Number of Meetings
FY 2024 YTD Totals	31	15	15	35
FY 2023 Totals	27	8	1	20
FY 2022 Totals	30	5	3	17

MS4 Minimum Control Measure #4 - Construction Site Stormwater Runoff Control



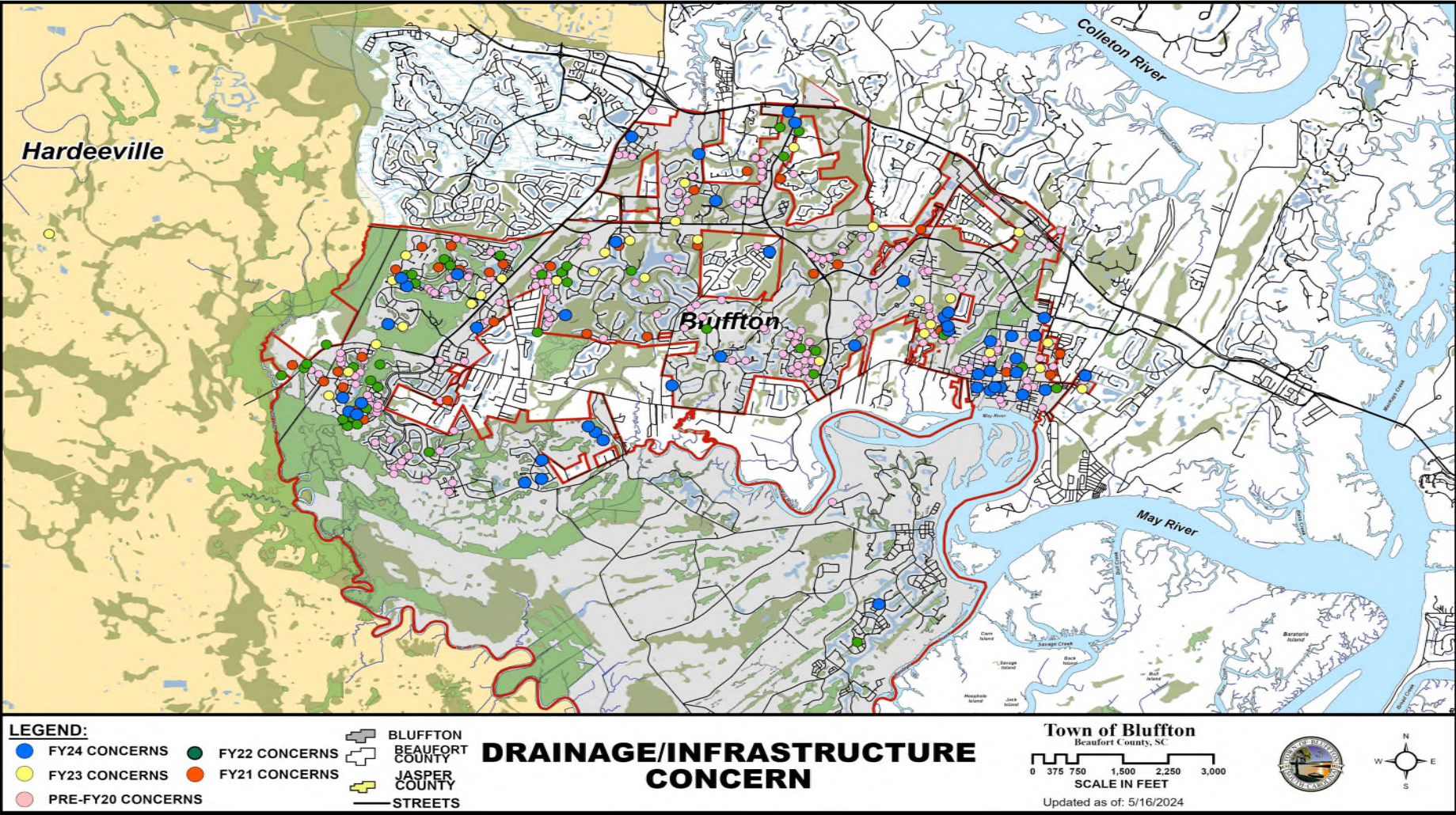
	Number of Sediment & Erosion Control Inspections	Number of Inspections Passed	Number of NOV's Issued	Number of SWO Issued	Number of Citations Issued	Number of E&SC Meetings
FY 2024 YTD Totals	1,772	1,667	100	10	0	473
FY 2023 Totals	2,321	2,030	266	26	0	577
FY 2022 Totals	3,127	2,701	392	49	0	673

MS4 Minimum Control Measure #5 Stormwater Plan Review & Related Activity



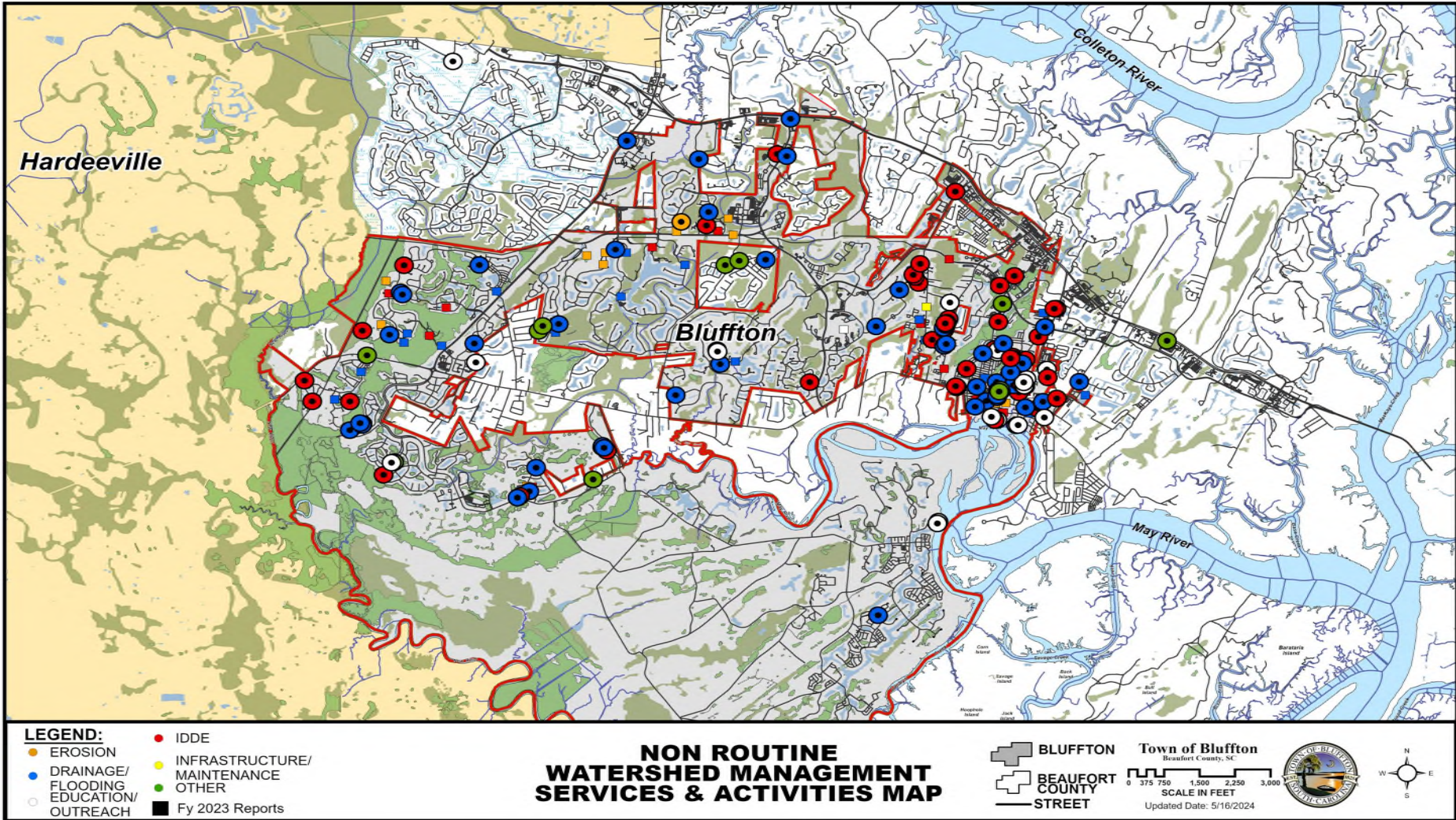
	Plan Reviews MS4 Reviews	SoLoCo Plan Reviews	Sureties	CCC Inspections	Pre-Construction Meetings	Pre-Clearing Inspections	Post Construction BMP Inspections	Pre-Application Meetings	Total Plan Review Hours
FY 2024 YTD	308	60	25	66	34	24	42	45	261 Hrs.
FY 2023 Totals	297	67	42	40	15	13	45	50	386 Hrs.
FY 2022 Totals	231	13	42	26	30	23	44	26	454 Hrs.

Citizen Drainage, Maintenance and Inspections Concerns Map



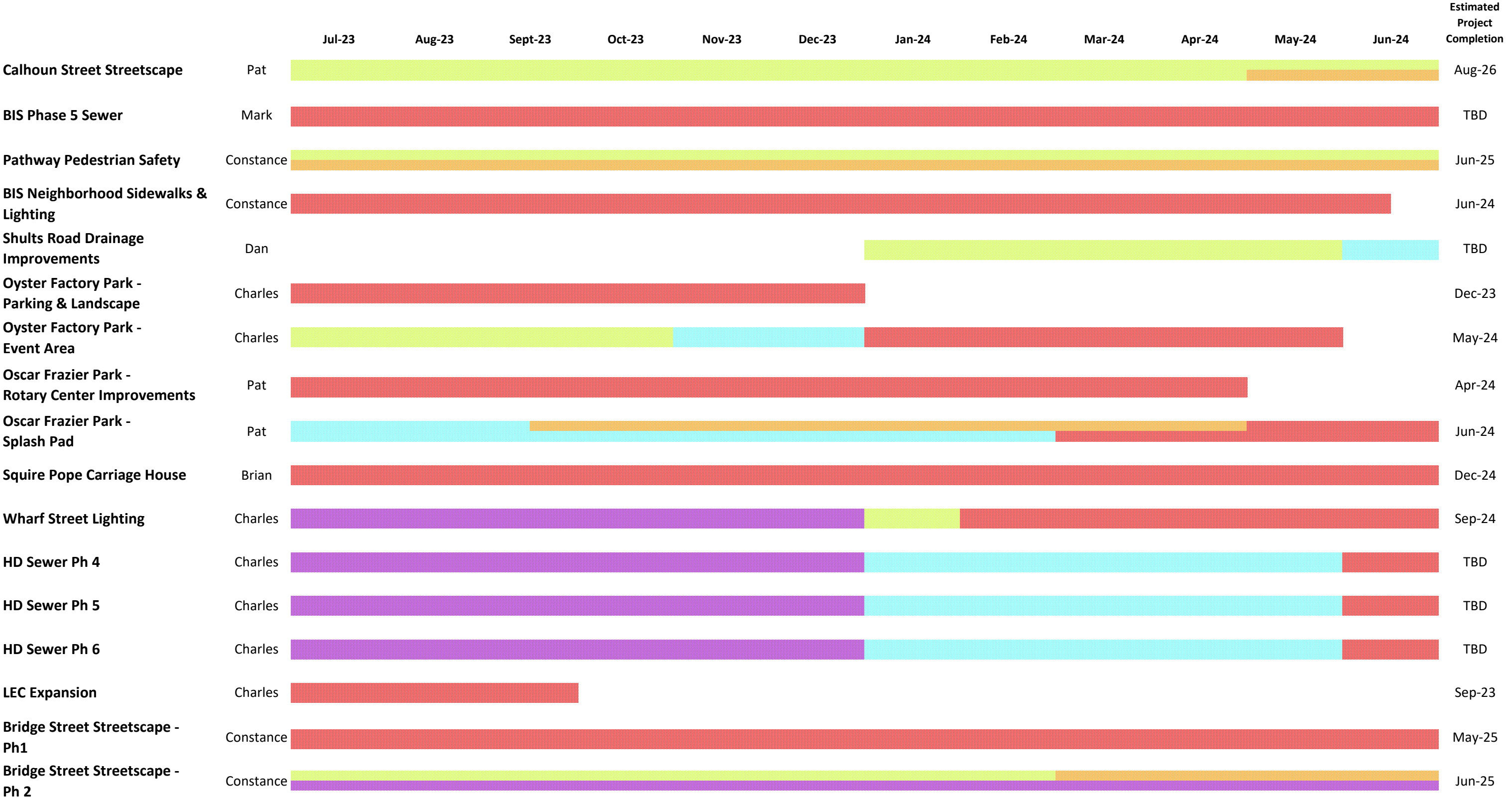
	Number of Drainage Concerns Investigated	Number of Meetings
FY 2024 YTD Totals	43	13
FY 2023 Totals	61	52
FY 2022 Totals	38	34

Citizen Request for Watershed Mngt. Services & Activities Map



	Number of Citizen Requests Investigated	Number of Meetings
FY 2024 YTD Totals	129	37
FY 2023 Totals	46	23
FY 2022 Totals	33	21

FY24 CIP Master Project Schedule



SUBJECT TO CHANGE

FY24 CIP Master Project Schedule



TOWN COUNCIL

STAFF REPORT

Public Services Department



MEETING DATE:	June 11, 2024
SUBJECT:	Public Services Department Monthly Report
DIRECTOR:	Vacant, Director of Public Services

PUBLIC SERVICES UPDATE

1. **MS4 MCM – #6 Good Housekeeping (Ditch, Drainage and Roadside Maintenance)**
 - **Street Sweeping** - Performed weekly street sweeping on Calhoun Street, Highway 46, Bruin Road, May River Road, Pin Oak Street, Bridge Street, Church Street, Lawton Street, Lawrence Street, Allen Street, Water Street, Boundary Street, and curbs and medians on Simmonsville and Buck Island Roads.
 - **Ditch Inspections** - Performed ditch inspections
 - Arrow ditch (2,569 LF)
 - Red Cedar ditch (966 LF)
 - Buck Island roadside ditch (15,926 LF)
 - Simmonsville roadside ditch (13,792 LF)
 - **Ongoing Roadside Mowing, Litter Clean-up and Maintenance** of Hampton Parkway, Buck Island and Simmonsville Roads, Goethe Road, Shults Road, Jason and Able Streets, Whispering Pine Road, May River Road, Bluffton Road, Boundary, Calhoun, Bridge Street, Pritchard Street, Buckwalter Boulevard, Bruin Road, Green Street, James Gadson Drive, Thomas Heyward, Church St, Water St, Lawton St. and Colcock St.
2. **FACILITIES**
 - **Ongoing Maintenance** of Town Hall, Law Enforcement Center, Public Services, Rotary Community Center, Watershed Management, Police Sub-station, Don Ryan Center, and general repairs of the Garvin House and Sarah Riley.

3. PARKS

- **Ongoing Park Facilities and Landscape Maintenance** of Dubois Park, Martin Family Park, Oscar Frasier, Field of Dreams, Buckwalter Place Park, Oyster Factory Park, Pritchard Pocket Park, May River Pocket Park, Wright Family Park, Eagles Fields, New Riverside Barn, New River Trail, and the newly acquired Evercore Park.

4. PREPPING FOR SPECIAL AND CIVIC EVENTS**5. BEAUTIFICATION PROGRAM**

- Upcoming Workplan for fiscal year 24/25
- Parks Tour for Committee Members

6. ATTACHMENTS

- **Public Services Monthly Cost Report** – Attachment 1
- **Beautification Committee Agenda**- Attachment 2

Public Services Monthly Cost Reports - May 2024*(Cost Includes Labor and Equipment)*

ASSETS AND EVENTS	COST
FACILITIES	\$9,226.77
PARKS	\$14,580.38
ROADS AND TRAILS	\$14,603.54
SPECIAL EVENTS	\$1,050.00



Beautification Committee Meeting

Thursday, May 16, 2024 at 9:00 AM

Theodore D. Washington Municipal Building, Henry "Emmett" McCracken Jr. Council
Chambers, 20 Bridge Street, Bluffton, SC

AGENDA

I. CALL TO ORDER

II. ROLL CALL

III. ADOPTION OF MINUTES

IV. PUBLIC COMMENT

V. OLD BUSINESS

1. Coordinate Butterfly Garden Location at New Riverside Barn

VI. NEW BUSINESS

1. Upcoming Workplan for fiscal year 24/25
2. Parks Tour for Committee Members

VII. DISCUSSION

1. Update of Town Park Projects

NEXT MEETING DATE: Thursday, June 20, 2024

VIII. ADJOURNMENT

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Executive Session – The public body may vote to go into executive session for any item identified for action on the agenda.

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Public comment is limited to 3 minutes per speaker.*



Director’s Report – DRCI
May 2024

Entrepreneur Program Update

- STARTUP companies
 1. Hardee Greens
 2. ChangePoint
 3. Petitek
 4. ESA
 5. Pro Series Golf Irons
 6. OPFOB
 7. Dance Canape
 8. Part of the Family
- GROWTH
 1. Beachside Tire
 2. Bluffton Electric
 3. LaSource
 4. Delta Roofing
 5. Custom Audio Video
 6. Universal Bookkeeping
 7. Noble Hearts Human Resources

Key efforts in May

- Universal Bookkeeping is back at the DRCI as a GROWTH company
- Noble Hearts Human Resources started as a GROWTH company
- Diligence Meeting with potential STARTUP Program

Economic Development Update

Overview

Following the enactment of the Economic Development Ordinance, the DRCI is increasingly engaged in traditional economic development activities. Our current primary focus encompasses two critical elements:

1. The implementation of a comprehensive marketing strategy aimed at enhancing awareness of the EDO program. A meticulously crafted marketing plan has been developed, incorporating various activities designed to generate leads and facilitate communication. This plan includes targeted messaging, digital media initiatives, social media engagement, and other strategies to effectively disseminate information and streamline the application process for potential participants.
2. The ongoing development of the Buckwalter Place Project, situated near the LEC, is another key undertaking. DRCI is set to occupy a portion of Building A, and various aspects of this project are now entering a phase requiring detailed review and oversight.

In addition to these projects, we maintain regular interactions with Assistant Town Manager Chris Forster and the BCEDC. These meetings are instrumental in ensuring that all parties are consistently informed about emerging opportunities and collaborative endeavors that may benefit any or all of the involved organizations. Our goal is to foster a synergistic approach to economic development, leveraging the strengths and resources of each entity to maximize impact and efficiency.

Key efforts in May

- Launched the Economic Development Incentive Program website, found at www.blufftonbusiness.com.
- This site provides general information, news, and application details for prospective participants.
- The site will be accessible directly and through links on the DRCI and TOB websites.
- Engaged with an existing Bluffton company regarding a second location in the New Riverside area. Although the industry (automotive repair) is not among the target industries and thus did not qualify for the program, we offered support in locating appropriately zoned sites.
- Consulted with two veterinarian businesses regarding their eligibility. There is currently some uncertainty about whether veterinarians qualify for the incentive plan under the medical industry category. Clarification is needed promptly to provide accurate guidance to prospects.

Operations and Marketing

- Presented quarterly Town Council Update
- Presented DRCI to Councilwoman Burden
- April Board meeting
- Staff members attended Heritage on Friday and Saturday
- Held AI in Business lunch and learn classes for the greater Bluffton community
- Partnered with TCL to do an AI series starting in May
- Going to present AI series to NIOA/Government Committee Workshop. Debbie Szpanka is a member.
- OPFOB held their 3rd Annual Concert for the Heroes – about 3000 in attendance
- Several conference room rentals
- Working on developing a new program called THRIVE
- Working on developing a new program called EVOLVE
- Working on developing a new program called TRADEUP
- Hosted Professional Women’s Network at The HUB
- Attended Arbor Day celebration
- Attended TCL groundbreaking celebration
- Hosted 5th annual HHCA Shark Tank event
- Attend the Barnwell Chamber of Commerce event in which the women's business center was opened. Also, at this event met with other StimulateSC grant attendees as the Department of Commerce organize the meeting of recipients. When asked to give an update on our AI program the group was very enthusiastic about learning more and perhaps having the Don Ryan Center present to other groups throughout the region.
- Our AI series continues to generate interest and enhance the Don Ryan Center's reputation. One of our strategic goals is to establish the DRCI as a thought leader in artificial intelligence, and we are making significant progress. In addition to hosting events at TCL and an upcoming Beaufort Digital Corridor event, we've been invited to present for other organizations in the region. As technology evolves, we continually update our presentation series to remain current and relevant. Many in the business world are uncertain about how to approach AI from an executive perspective. Our goal is to clarify the basics and highlight productivity gains without delving into excessive pessimism, focusing instead on practical benefits for companies.

Mentor Program

- 70 Mentors

Partnerships

Hardeeville

- Planned AI Educational Series to start in June
- Working with City of Hardeeville on social media sites DRCI/HDV
- Annual paid partnership renewed

BlacQuity

- Graduation in June

Beaufort County Economic Development Corporation

- Working with them on multiple projects

Greater Bluffton Chamber

- Exhibitor at the Greater Bluffton Chamber Business Expo
- GBCC Membership 101 The Hub
- Attended multiple ribbon cuttings

Hilton Head – Bluffton Chamber

- Attended multiple ribbon cuttings and ground breakings



GROWTH MANAGEMENT UPDATE

June 11, 2024

1. Town Council Appointed Boards/Commissions/Committees/Citizen Group Meetings:

- a. **Planning Commission:** May 22, 2024, meeting agenda attached. Next meeting scheduled for Wednesday, June 26, 2024.
- b. **Historic Preservation Commission:** May 1, 2024, cancellation notice attached. Next meeting scheduled for Wednesday, June 5, 2024.
- c. **Board of Zoning Appeals:** May 7, 2024, cancellation notice attached. Next meeting scheduled for Tuesday, June 4, 2024.
- d. **Development Review Committee:** May 1, 8, 15 & 22, 2024 meeting agendas attached. May 29, 2024 cancellation notice attached. Next meeting scheduled for Wednesday, June 5, 2024.
- e. **Historic Preservation Review Committee:** May 6 & 20, 2024 meeting agendas attached. May 13 & 28, 2024 cancellation notices attached. Next meeting scheduled for Monday, June 3, 2024.
- f. **Construction Board of Adjustment and Appeals:** May 28, 2024, cancellation notice attached. Next meeting scheduled for Tuesday, June 25, 2024.
- g. **Affordable Housing Committee:** May 2, 2024, meeting agenda attached. Next meeting scheduled for Thursday, June 6, 2024.

2. Community Development / Affordable Housing Committee Work Program:

Neighborhood Assistance Program.

The budget for Fiscal Year 2024 Neighborhood Assistance Budget was adopted at \$290,000. As of February 14, the updated budget is \$304,000.

To date, 17 homes have been serviced for home repairs such as roofing and interior repairs totaling \$259,402. Twenty – one homes have been serviced for septic pump outs, totaling \$8,357, and four homes for tree service totaling \$7,780.

As of May 30, 2024, 42 homes have been serviced through the Neighborhood Assistance Program. Collectively, the program has a current balance of \$14,061.

ATTACHMENTS:

1. Planning Commission meeting agenda for May 22, 2024.
2. Historic Preservation Commission cancellation notice for May 1, 2024.
3. Board of Zoning Appeals cancellation notice for May 7, 2024.
4. Development Review Committee meeting agendas for May 1, 8, 15, 22, 2024 and cancellation notice for May 29, 2024.
5. Historic Preservation Review Committee meeting agendas for May 6 & 20, 2024 and cancellation notices for May 13 & 28, 2024.
6. Construction Board of Adjustments and Appeals cancellation notice for May 28, 2024.
7. Affordable Housing Committee meeting agenda for May 2, 2024.
8. Building Permits and Planning Applications:
 - a. Building Permits Issued FY 2017-2024 (to May 21, 2024).
 - b. Building Permits Issued Per Month FY 2017-2024 (to May 21, 2024).
 - c. Value of Construction FY 2017-2024 (to May 21, 2024).
 - d. New Single Family Residential Building Permits Issued Per Month FY 2017-2024 (to May 21, 2024).
 - e. New Single Family Residential Building Permits Issued by Neighborhood FY 2017-2024 (to May 21, 2024).
 - f. New Single-Family Certificates of Occupancy Issued by Neighborhood FY 2017-2024 (to May 21, 2024).
 - g. New Commercial Construction/Additions Heated Square Footage FY 2017-2024 (to May 21, 2024).
 - h. Planning and Community Development Applications Approved FY 2017-2024 (to May 21, 2024).
 - i. Multi Family Apartments Value FY 2017-2024 (to May 21, 2024).
 - j. Multi Family Apartments Square Footage FY 2017-2024 (to May 21, 2024).
 - k. Multi Family Apartments Total Units FY 2017-2024 (to May 21, 2024).
9. Planning Active Application Report



Planning Commission Meeting

Wednesday, May 22, 2024 at 6:00 PM

Theodore D. Washington Municipal Building, Henry "Emmett" McCracken Jr. Council Chambers,
20 Bridge Street, Bluffton, SC

AGENDA

This meeting can be viewed live on [BCTV](#), on Hargray Channel 9 and 113 or on Spectrum Channel 1304.

I. CALL TO ORDER

II. ROLL CALL

III. NOTICE REGARDING ADJOURNMENT

The Planning Commission will not hear new items after 9:30 p.m. unless authorized by a majority vote of the Commission Members present. Items which have not been heard before 9:30 p.m. may be continued to the next regular meeting or a special meeting date as determined by the Commission Members.

IV. ADOPTION OF MINUTES

1. April 24, 2024 Minutes

V. PUBLIC COMMENT

VI. OLD BUSINESS

VII. NEW BUSINESS

1. Consideration of an Ordinance to Amend the Town of Bluffton's Comprehensive Plan ("Blueprint Bluffton") to Incorporate a Housing Impact Analysis - Public Hearing (Staff - Charlotte Moore)
2. Consideration of Ordinances Related to Property Owned by Bryant Family, LLC, Consisting of a Total of 2.14 Acres, More or Less, Located at 30 Davis Road and identified by Beaufort County Tax Map No. R600-029-000-0028-0000 (Staff - Kevin Icard)
 - A. Consideration of an Amendment to the Town of Bluffton Comprehensive Plan "Blueprint Bluffton" to Amend the Said Property's Future Land Use Designation;
 - B. Consideration of 100% Annexation Request;
 - C. Consideration of a Zoning Map Amendment.

3. **The May - 1095 May River Road (Street Naming Application):** A request by Workforce State of Mind, LLC on behalf of the Town of Bluffton for approval of a street naming application. The project consists of two streets for The May neighborhood with associated townhome lots. The property is identified by tax map number R610 039 000 0498 0000 and is located at 1095 May River Road in the Residential General Zoning District. (STR-04-24-019089) (Staff - Dan Frazier)
4. **Buckwalter Towne Blvd Medical Office Building (Development Plan Application):** A request by Cranston, LLC on behalf of TKC CCCLV, LLC for approval of a preliminary development plan application. The project consists of a three-story, 54,000 square foot medical office building with associated parking and infrastructure. The property is zoned Buckwalter Planned Unit Development and consist of approximately 4.76 acres identified by tax map number R610 030 000 1854 0000 located within the Buckwalter Commons Phase 1 Master Plan. (DP-03-24-019021) (Staff - Dan Frazier)
5. **Maiden Lane (Development Plan Application):** A request by Nathan Sturre of Sturre Engineering on behalf of the property owner Hinton Vacation Properties, LLC, for approval of a preliminary development plan application. The project proposes the development of a thirteen (13) lot mixed-use subdivision containing eleven (11) single-family residential lots, two (2) mixed-use lots, common open space, and associated infrastructure. The properties are zoned Neighborhood General – Historic District and consist of 3.58 acres identified by tax map numbers R610 039 00A 0042 0000 and R610 039 00A 042A 0000 located on the south side of May River Road west of Pritchard Street. (DP-12-23-018802) (Staff - Dan Frazier)
6. Consideration of Ordinances Related to Property Commonly Referred to University Investments, LLC Consisting of a Total of 65.592 Acres, More or Less, Located at Southwest Corner of the Buckwalter Parkway and Lake Point Drive Intersection and to the West of the Retreat at Grande Oaks, and Bearing Beaufort County Tax Map Nos. R600-029-000-0014-0000 (Portion) and R600-029-000-2410-0000 (Staff - Kevin Icard)
 - A. Consideration of an Amendment to the Town of Bluffton Comprehensive Plan "Blueprint Bluffton" to Amend the Said Properties Future Land Use Designation;
 - B. Consideration of 100% Annexation Request;
 - C. Consideration of an Amendment to the Buckwalter Planned Unit Development for a New Land Use Tract;
 - D. Consideration of a Zoning Map Amendment;
 - E. Consideration of an Amendment to the Buckwalter Development Agreement; and
 - F. Consideration of an Amendment to the Buckwalter Development Agreement Concept Plan.

VIII. DISCUSSION

IX. ADJOURNMENT

NEXT MEETING DATE: Wednesday, June 26, 2024

“FOIA Compliance – Public notification of this meeting has been published and posted in compliance with the Freedom of Information Act and the Town of Bluffton policies.”

In accordance with the requirements of Title II of the Americans with Disabilities Act of 1990 ("ADA"), the Town of Bluffton will not discriminate against qualified individuals with disabilities on the basis of disability in its services, programs, or activities. The Town of Bluffton Council Chambers are ADA compatible. Auditory accommodations are available. Any person requiring further accommodation should contact the Town of Bluffton ADA Coordinator at 843.706.4500 or adacoordinator@townofbluffton.com as soon as possible but no later than 48 hours before the scheduled event.

Executive Session – The public body may vote to go into executive session for any item identified for action on the agenda.

**Please note that each member of the public may speak at one public comment session and a form must be filled out and given to the Town Clerk. To submit a public comment online, please click here:*

<https://www.townofbluffton.sc.gov/FormCenter/Town-15/Public-Comment-60>

Public comment is limited to 3 minutes per speaker.



PUBLIC NOTICE

THE HISTORIC PRESERVATION COMMISSION (HPC)

Meeting scheduled for

Wednesday, May 1, 2024 at 6:00 P.M.

has been CANCELED
due to a lack of agenda items.

The next meeting is scheduled for
Wednesday, June 5, 2024.

If you have questions, please contact
Growth Management at: 843-706-4500



PUBLIC NOTICE

The Board of Zoning Appeals (BZA)
Meeting scheduled for

Tuesday, May 7, 2024, at 6:00 p.m.

Has been CANCELED
due to a lack of agenda items.

The next meeting is scheduled for Tuesday,
June 4, 2024.

If you have questions, please contact
Growth Management at: 843-706-4500



Development Review Committee Meeting

Wednesday, May 01, 2024 at 1:00 PM

Theodore D. Washington Municipal Building, Henry "Emmett" McCracken Jr. Council Chambers,
20 Bridge Street, Bluffton, SC

AGENDA

All Applications can be viewed on the Town of Bluffton's Permit Finder page
<https://www.townofbluffton.us/permit/>

I. CALL TO ORDER

II. ROLL CALL

III. PUBLIC COMMENT

IV. OLD BUSINESS

1. **Maiden Lane Development (Development Plan):** A request by Nathan Sturre of Sturre Engineering on behalf of the property owner Hinton Vacation Properties, LLC, for approval of a preliminary development plan application. The project proposes the development of a thirteen (13) lot mixed-use subdivision containing eleven (11) single-family residential lots, two (2) mixed-use lots, common open space, and associated infrastructure. The properties are zoned Neighborhood General – Historic District (NG-HD) and consist of 3.58 acres identified by tax map numbers R610 039 00A 0042 0000 and R610 039 00A 042A 0000 located on the south side of May River Road west of Pritchard Street. (DP-12-23-018802) (Staff – Dan Frazier)

V. NEW BUSINESS

1. **Compass Self Storage (Certificate of Appropriateness-HCO):** A request by Amsdell Construction, LLC, on behalf of the owners, Amsdell Storage Ventures 81, LLC, for review of a Certificate of Appropriateness-Highway Corridor Overlay application. The project consists of two, two-story buildings totaling approximately 109,398 SF of climate-controlled self-storage space, the associated landscaping, lighting and other infrastructure. The properties are zoned Jones Estate PUD, consist of 3.21 acres identified by tax map numbers R610 036 000 0459 0000 and R610 036 000 0458 0000, and are located at the northeast corner of the Caine Drive and Estate Drive intersection, west of Gibbet Road, and fronts on SC Hwy 170. (COFA-03-24-019062)(Staff - Katie Peterson)
2. **New Riverside Village Park (Public Project):** A request by Constance Clarkson on behalf of the Town of Bluffton for approval of a public project. The project consists of the installation of

trellis swings, trash cans, dog stations and decorative pathway lighting in New Riverside Village Park. The properties are zoned New Riverside PUD and consists of approximately 5.29 acres identified by tax map numbers R610 036 000 3703 0000 and R610 036 000 3214 0000 and located within the New Riverside Village Master Plan. (DP-04-24-019083) (Staff - Dan Frazier)

3. **Buckwalter Place – Northwest Commercial (Public Project):** A request by Mark Maxwell on behalf of the Town of Bluffton for approval of a public project. The public private partnership consists of the construction of three commercial buildings totaling approximately 50,000 square feet of class A office and light industrial warehouse space, with supporting infrastructure. The properties are zoned Buckwalter PUD and consists of approximately 5.2 acres identified by tax map numbers R610 030 000 1848 0000, R610 022 000 1103 0000 and R610 030 000 1649 0000, and located within the Buckwalter Place Master Plan. (DP-04-24-019078) (Staff - Dan Frazier)
4. **South of Broad Healthcare (Master Plan Amendment):** A request by Dan Keefer of Witmer Jones Keefer, Ltd, on behalf of the property owner, South of Broad Healthcare, for approval of a minor master plan amendment application. The Applicant proposes to amend the South of Broad Healthcare Master Plan by adding an approximately 26,000 square foot third floor, increased mechanical and utility yard, and relocating the Helipad from the roof to ground level. The property is zoned Buckwalter PUD and consists of 12.52 acres identified by tax map number R610 030 000 1705 0000, located at the northwest corner of the intersection of Bluffton Parkway and Buckwalter Parkway. (MPA-03-24-019064) (Staff - Dan Frazier)
5. **Mainland (Development Plan):** A request by John Paul Moore of Thomas & Hutton on behalf of Pritchard Farm, LLC for approval of a final development plan. The project consists of 10 single family residential lots, open space, and associated infrastructure. The property is zoned New Riverside PUD and consists of approximately 38.3 acres identified by tax map numbers R610 044 000 0136 0000, R610 044 000 0141 0000, R600 045 000 0001 0000, R610 044 000 0002 0000, R614 045 000 0052 0000, R614 045 000 0578 0000 and R600 045 000 0012 0000 located within Parcel 9 of the New Riverside Concept Master Plan. (DP-10-22-017341) (Staff - Dan Frazier)
6. **Palmetto Bluff – Citadel Phase 3 (Development Plan):** A request by T.J. Behm of Thomas & Hutton, on behalf of the property owner Citadel Bluffton, LLC for approval of a final development plan. The project consists of the construction of two (2) 20,525 SF buildings to be used as showroom/contractor warehouses and associated infrastructure. The properties are zoned Palmetto Bluff PUD and consists of +/- 3.7 acres identified by tax map numbers R614 045 000 0643 0000 and R614 046 000 0062 0000 located within the Palmetto Bluff Tract Master Plan. (DP-12-22-017474) (Staff – Dan Frazier)
7. **New Riverside Medical Office (Development Plan):** A request by Ryan Lyle of Davis & Floyd, Inc., on behalf of Russell Baxley of Beaufort Memorial Hospital for approval of a preliminary development plan. The project consists of the construction of a 5,000 SF medical office building with associated parking and pedestrian access. The property is zoned Jones Estate PUD and consists of approximately 1.37 acres identified by tax map number R610 036 000 3212 0000 and located within the May River Crossing Master Plan. (DP-03-24-019067) (Staff – Dan Frazier)

8. **Joiner Property – 9 Bruin Road (Development Plan):** A request by Jonathan Marsh of Witmer Jones Keefer, Ltd, on behalf of the property owner, Eugene Marks of JOHA LLC, for approval of a preliminary development plan. The project proposes the installation of site infrastructure including internal drive, access, parking, walks, utilities, drainage, and stormwater infrastructure to support one existing residential unit and the future development of three mixed-use commercial lots and two mixed-use carriage houses for a combined total square footage of +/- 19,100 SF. The property is zoned Neighborhood Commercial – Historic District (NC-HD) and consists of approximately 0.79 acres identified by tax map number R610 039 00A 0021 0000 located at the northeast corner of Bluffton Road and Bruin Road. (DP-03-24-019066) (Staff – Dan Frazier)

VI. DISCUSSION

VII. ADJOURNMENT

NEXT MEETING DATE: Wednesday, May 8, 2024

“FOIA Compliance – Public notification of this meeting has been published and posted in compliance with the Freedom of Information Act and the Town of Bluffton policies.”

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Executive Session – The public body may vote to go into executive session for any item identified for action on the agenda.

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Public comment is limited to 3 minutes per speaker.



Development Review Committee Meeting

Wednesday, May 08, 2024 at 1:00 PM

Theodore D. Washington Municipal Building, Henry "Emmett" McCracken Jr. Council Chambers,
20 Bridge Street, Bluffton, SC

AGENDA

All Applications can be viewed on the Town of Bluffton's Permit Finder page
<https://www.townofbluffton.us/permit/>

I. CALL TO ORDER

II. ROLL CALL

III. PUBLIC COMMENT

IV. OLD BUSINESS

V. NEW BUSINESS

1. **Buckwalter Place Veterinary Hospital (Development Plan):** A request by Alec Metzger of EMC Engineering Services, Inc., on behalf of Daniel Iyer for approval of a final development plan. The project consists of the construction of a two-story veterinary office building totaling 9,000 SF and associated parking and infrastructure. The property is zoned Buckwalter Planned Unit Development and consists of approximately 0.83 acres identified by tax map number R610 029 000 1732 0000 and located within the Buckwalter Place Master Plan. (DP-07-21-015654) (Staff – Dan Frazier)
2. **The May (Street Naming):** A request by Workforce State of Mind, LLC on behalf of the Town of Bluffton for approval of a street naming application. The project consists of two streets for The May neighborhood with associated townhome lots. The property is identified by tax map number R610 039 000 0498 0000 and is located at 1095 May River Road in the Residential General Zoning District. (STR-04-24-019089) (Staff - Dan Frazier)

VI. DISCUSSION

VII. ADJOURNMENT

NEXT MEETING DATE: Wednesday, May 15, 2024

“FOIA Compliance – Public notification of this meeting has been published and posted in compliance with the Freedom of Information Act and the Town of Bluffton policies.”

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Development Review Committee Meeting

Wednesday, May 15, 2024 at 1:00 PM

Theodore D. Washington Municipal Building, Henry "Emmett" McCracken Jr. Council Chambers,
20 Bridge Street, Bluffton, SC

AGENDA

All Applications can be viewed on the Town of Bluffton's Permit Finder page
<https://www.townofbluffton.us/permit/>

I. CALL TO ORDER

II. ROLL CALL

III. PUBLIC COMMENT

IV. OLD BUSINESS

V. NEW BUSINESS

1. **Compass Self Storage (Development Plan):** A request by the property owner Jonathan Steele of Amsdell Storage Ventures 81, LLC, for approval of a final development plan application. The project consists of two two-story, climate-controlled self-storage buildings totaling 109,398 square feet, including a retail sales/rental office and incidental truck rentals. The property is zoned Jones Estate PUD and consists of approximately 3.21 acres identified by tax map numbers R610-036-000-0458-0000 and R610-036-000-0459-0000 and located at the intersection of Gibbet Road and Highway 170 within the Palmetto Point Commercial Master Plan. (DP-09-22-017236) (Staff – Dan Frazier)
2. **Palmetto Bluff – Anson Golf Course (Development Plan):** A request by Drew Lonker of Thomas & Hutton, on behalf of Palmetto Bluff Uplands, LLC, for approval of a final development plan. The project consists of general clearing, parking, storm drainage treatment infrastructure, access roadways, maintenance, and temporary hospitality facilities, and grading to serve the proposed 18-hole golf course. The property is zoned Palmetto Bluff PUD and consists of +/- 104 acres identified by tax map numbers R614 057 000 0001 0000, R614 045 000 0019 0000, and R614 045 000 0026 0000, located within the Palmetto Bluff PUD, west of Big House Plantation Road. (DP-01-24-018822) (Staff – Dan Frazier)

VI. DISCUSSION

VII. ADJOURNMENT

NEXT MEETING DATE: Wednesday, May 22, 2024

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Public comment is limited to 3 minutes per speaker.



Development Review Committee Meeting

Wednesday, May 22, 2024 at 1:00 PM

Theodore D. Washington Municipal Building, Henry "Emmett" McCracken Jr. Council Chambers,
20 Bridge Street, Bluffton, SC

AGENDA

All Applications can be viewed on the Town of Bluffton's Permit Finder page
<https://www.townofbluffton.us/permit/>

I. CALL TO ORDER

II. ROLL CALL

III. PUBLIC COMMENT

IV. OLD BUSINESS

V. NEW BUSINESS

1. **Heritage at New Riverside Phase 8 (Subdivision):** A request by Tyler Vaughn of Thomas & Hutton on behalf of K. Hovnanian Homes for approval of a subdivision application. The project consists of creating 48 single-family residential lots and associated infrastructure. The property is identified by tax map numbers R614 035 000 1362 0000 and R614 035 000 1318 0000 and consists of 15.5 acres. The development is located along Founders Walk, and Preamble Drive. The property is zoned Jones Estate PUD. (SUB-04-24-019095) (Staff – Dan Frazier)

VI. DISCUSSION

VII. ADJOURNMENT

NEXT MEETING DATE: Wednesday, May 29, 2024

“FOIA Compliance – Public notification of this meeting has been published and posted in compliance with the Freedom of Information Act and the Town of Bluffton policies.”

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Public comment is limited to 3 minutes per speaker.



PUBLIC NOTICE

THE DEVELOPMENT REVIEW COMMITTEE (DRC)

Meeting scheduled for

Wednesday, May 29, 2024 at 1:00 P.M.

has been CANCELED
due to a lack of agenda items.

The next meeting is scheduled for
Wednesday, June 5, 2024.

If you have questions, please contact
Growth Management at: 843-706-4500



Historic Preservation Review Committee Meeting

Monday, May 06, 2024 at 4:00 PM

Theodore D. Washington Municipal Building, Henry “Emmett” McCracken Jr. Council Chambers,
20 Bridge Street, Bluffton, SC

AGENDA

I. CALL TO ORDER

II. ROLL CALL

III. PUBLIC COMMENT

IV. OLD BUSINESS

V. NEW BUSINESS

1. **113 Bridge St:** A request by William R. Court of Court Atkins Group on behalf of the owner, William Gary Roe Residential Property Trust, acting on behalf of prospective owners, Chris and Christine Murphy, for approval of a Certificate of Appropriateness - HD to relocate and rehabilitate the Contributing Resource known as the Tyson-Derst Cottage, located at 113 Bridge Street, in the Old Town Bluffton Historic District and zoned Riverfront Edge-HD (COFA-04-24-019080)(Staff – Glen Umberger)

VI. DISCUSSION

VII. ADJOURNMENT

NEXT MEETING DATE: Monday, May 13, 2024

“FOIA Compliance – Public notification of this meeting has been published and posted in compliance with the Freedom of Information Act and the Town of Bluffton policies.”

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Executive Session – The public body may vote to go into executive session for any item identified for action on the agenda.

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<https://www.townofbluffton.sc.gov/FormCenter/Town-15/Public-Comment-60>

Public comment is limited to 3 minutes per speaker.



PUBLIC NOTICE

THE HISTORIC PRESERVATION REVIEW COMMITTEE (HPRC)

Meeting scheduled for

Monday, May 13, 2024 at 4:00 P.M.

has been CANCELED
due to lack of agenda items.

The next meeting is scheduled for
Monday, May 20, 2024.

If you have questions, please contact
Growth Management at: 843-706-4500



Historic Preservation Review Committee Meeting

Monday, May 20, 2024 at 4:00 PM

Theodore D. Washington Municipal Building, Henry "Emmett" McCracken Jr. Council Chambers,
20 Bridge Street, Bluffton, SC

AGENDA

I. CALL TO ORDER

II. ROLL CALL

III. PUBLIC COMMENT

IV. OLD BUSINESS

V. NEW BUSINESS

1. **1 Blue Crab Street:** A request by Court Atkins Group, on behalf of the owner, April Perez, for a review of a Certificate of Appropriateness - HD to construct a new 2.5 story live/work building of approximately 3,180 SF with business and production facility on the first floor and a 1 1/2 story residential unit above and a 2-story Carriage House of approximately 1,060 SF, to be located at 1 Blue Crab Street, Lot 27 in the Tabby Roads Development, in the Old Town Bluffton Historic district and zoned Neighborhood General - HD zoning District. (COFA-11-23-018694)(Staff - Katie Peterson)

VI. DISCUSSION

VII. ADJOURNMENT

NEXT MEETING DATE: Tuesday, May 28, 2024

“FOIA Compliance – Public notification of this meeting has been published and posted in compliance with the Freedom of Information Act and the Town of Bluffton policies.”

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Executive Session – The public body may vote to go into executive session for any item identified for action on the agenda.

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Public comment is limited to 3 minutes per speaker.



PUBLIC NOTICE

THE HISTORIC PRESERVATION REVIEW COMMITTEE (HPRC)

Meeting scheduled for

Tuesday, May 28, 2024 at 4:00 P.M.

has been CANCELED
due to lack of agenda items.

The next meeting is scheduled for
Monday, June 3, 2024.

If you have questions, please contact
Growth Management at: 843-706-4500



PUBLIC NOTICE

The Construction Board of
Adjustments and Appeals (CBAA)
Meeting scheduled for

Tuesday, May 28, 2024, at 6:00 P.M.

has been CANCELED
due to lack of agenda items.

The next meeting is scheduled for
Tuesday, June 25, 2024.

If you have questions, please contact
Growth Management at: 843-706-4500



Affordable Housing Committee Meeting

Thursday, May 2, 2024, at 10:00 AM

Theodore D. Washington Municipal Building, Henry "Emmett" McCracken Jr. Council Chambers,
20 Bridge Street, Bluffton, SC

AGENDA

This meeting can be viewed live on [BCTV](#), on Hargray Channel 9 and 113 or on Spectrum Channel 1304.

I. CALL TO ORDER

II. ROLL CALL

III. ADOPTION OF THE AGENDA

IV. ADOPTION OF MINUTES

1. April 11, 2024

V. OLD BUSINESS

VI. NEW BUSINESS

1. FY2024 Neighborhood Assistance Program Budget Update

VII. DISCUSSION

1. Coastal Community Development Corporation, Alan Wolf

VIII. PUBLIC COMMENT

IX. ADJOURNMENT

NEXT MEETING DATE: Thursday, June 6, 2024

“FOIA Compliance – Public notification of this meeting has been published and posted in compliance with the Freedom of Information Act and the Town of Bluffton policies.”

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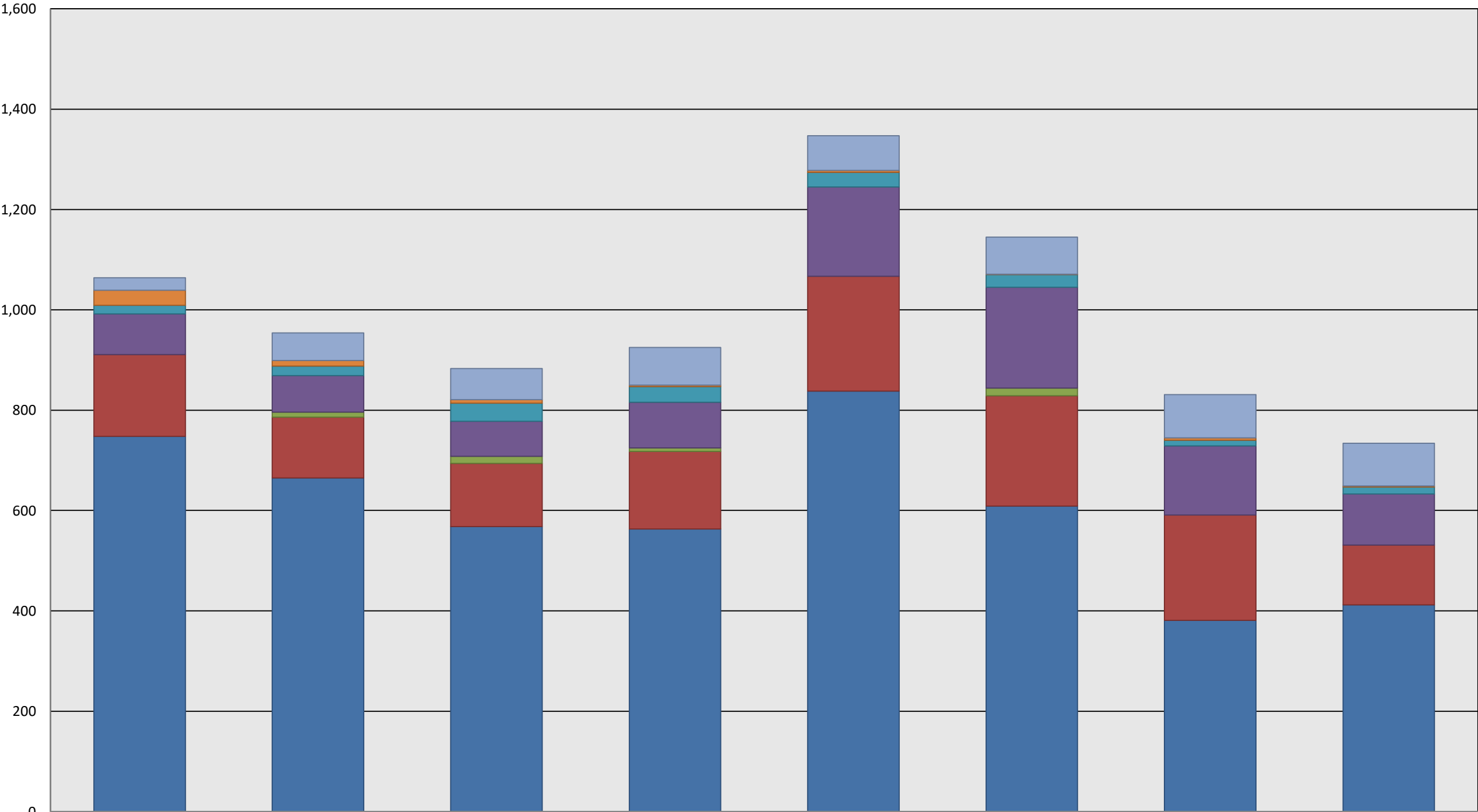
Public comment is limited to 3 minutes per speaker.

Town of Bluffton
Building Permits Issued
FY 2017 - 2024

Attachment 8a

Section X. Item #1.

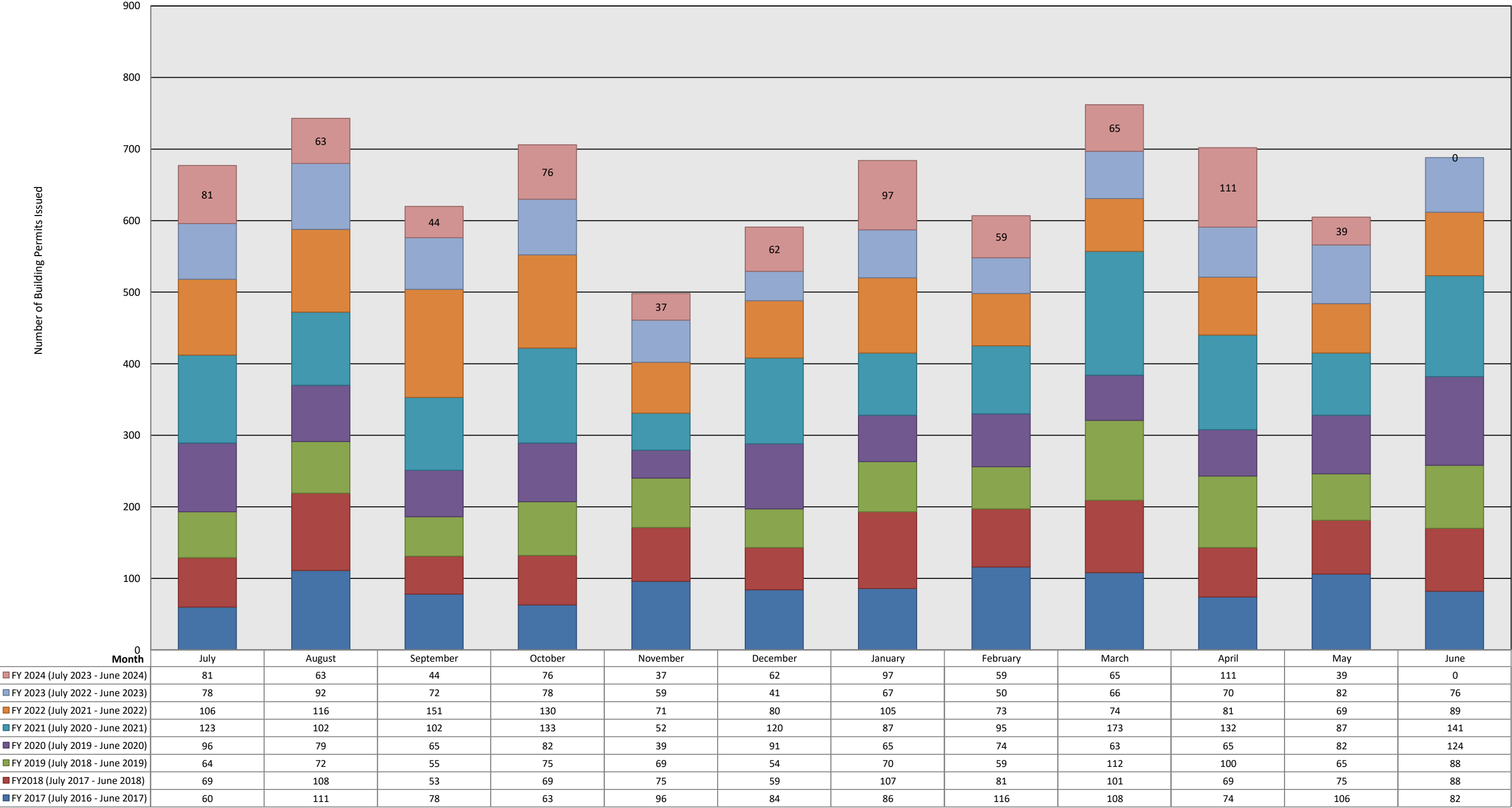
Number of Building Permits Issued



Year	FY 2017 (July 2016 - June 2017)	FY2018 (July 2017 - June 2018)	FY 2019 (July 2018 - June 2019)	FY 2020 (July 2019 - June 2020)	FY 2021 (July 2020 - June 2021)	FY 2022 (July 2021 - June 2022)	FY 2023 (July 2022 - June 2023)	FY 2024 (July 2023 - June 2024)
Other Commercial	25	55	62	75	69	74	86	85
Commercial Addition	30	11	7	3	4	1	5	2
New Commercial Construction/ Tenant Upfit	17	19	36	31	29	25	11	14
Other Residential	81	73	70	91	178	201	138	102
New Multi Family - Apartments	0	10	14	7	0	15	0	0
Residential Addition	163	121	126	155	229	220	210	119
New Single Family	748	665	568	563	838	609	381	412

Notes: 1. Building Permits Issued excludes those Building Permits which were voided or withdrawn.
2. Residential addition includes: additions, screen enclosures, carport, re-roof, modular.
3. Other residential includes: new accessory structure, new accessory residence.
4. Commerical addition includes: additions, screen enclosure, shell.
5. Other commerical includes: remodel and accessory structure.

Town of Bluffton
Building Permits Issued Per Month
FY 2017 - 2024

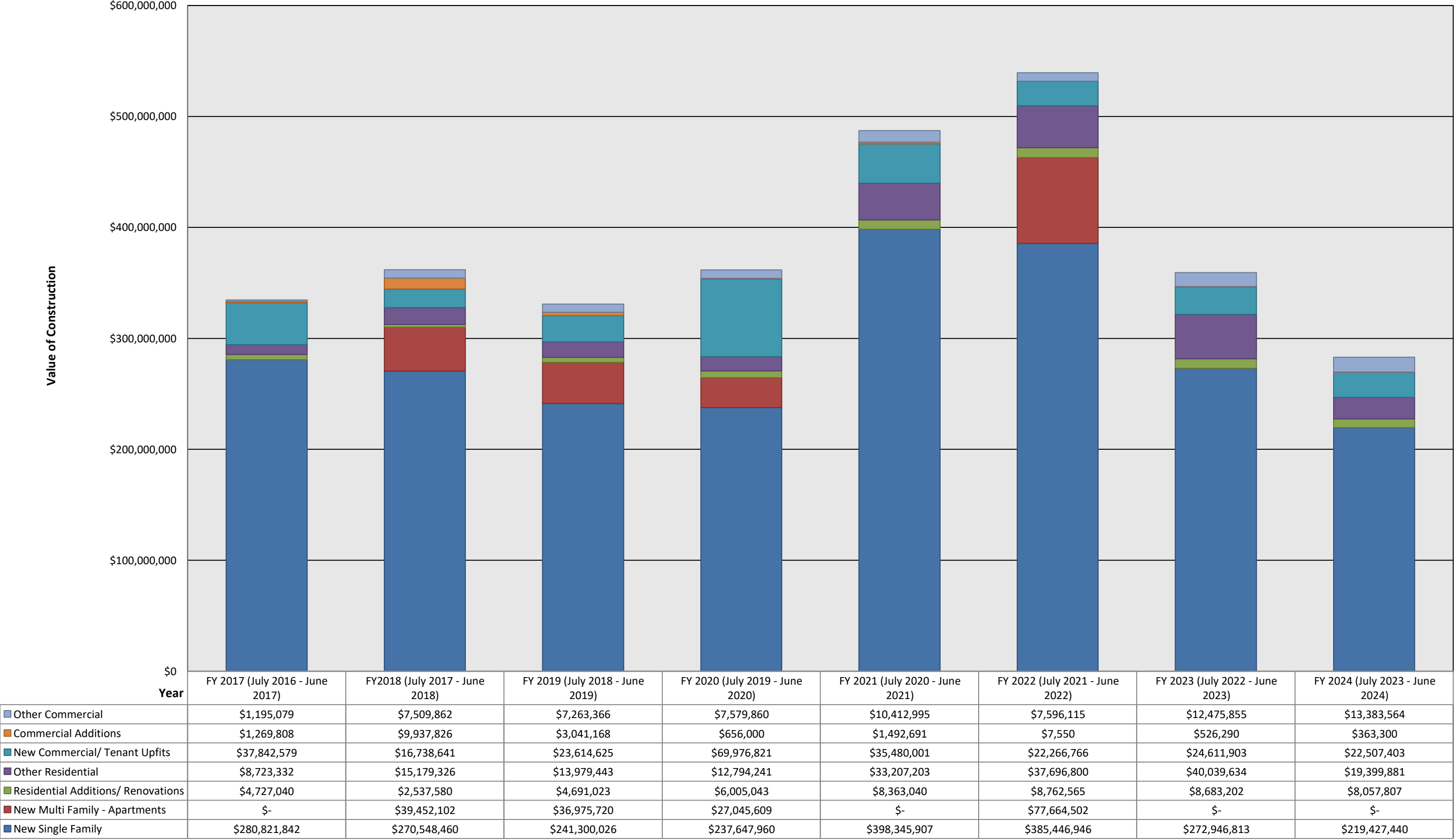


Notes: 1. Building Permits Issued excludes those Building Permits which were voided or withdrawn.

Town of Bluffton
Value of Construction
FY 2017 - 2024

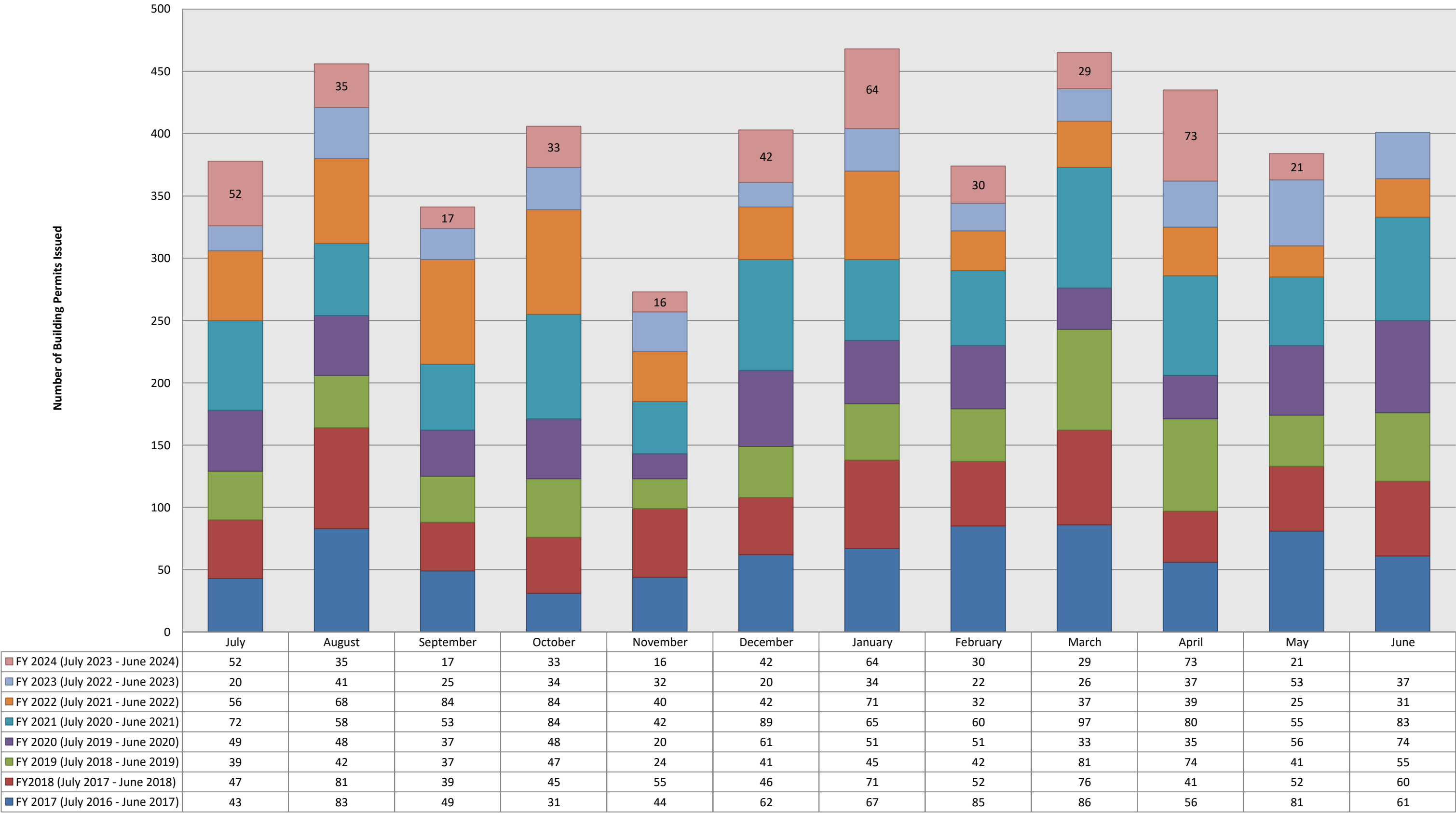
Attachment 8c

Section X. Item #1.



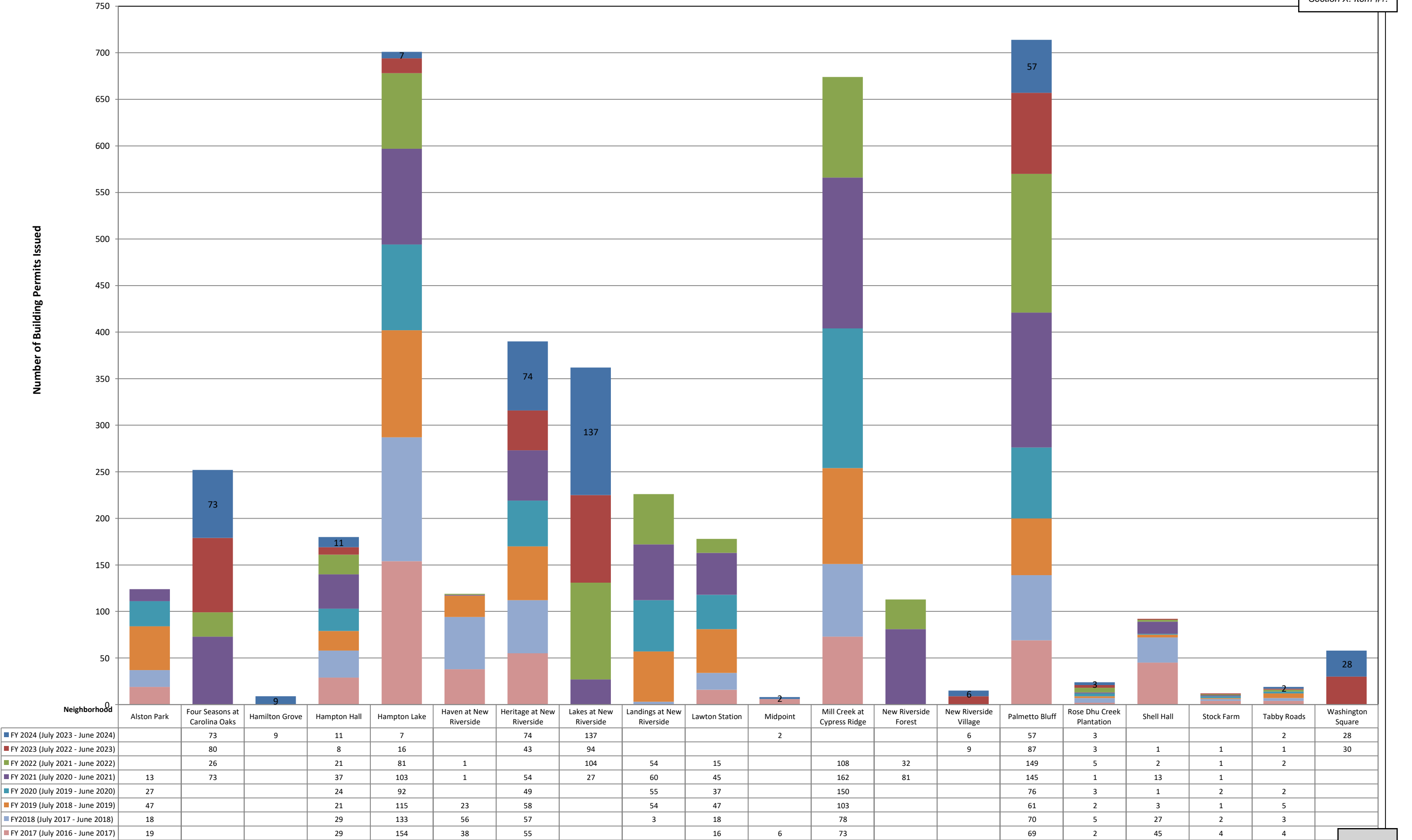
Notes: 1. Residential addition includes: additions, screen enclosures, carport, re-roof, modular.
2. Other residential includes: new accessory structure, new accessory residence.
3. Commerical addition includes: additions, screen enclosure, shell.
4. Other commerical includes: remodel and accessory structure.

Town of Bluffton
New Single Family Residential Building Permits Issued Per Month
FY 2017 - 2024



Note: Building Permits Issued excludes those Building Permits which were voided or withdrawn.

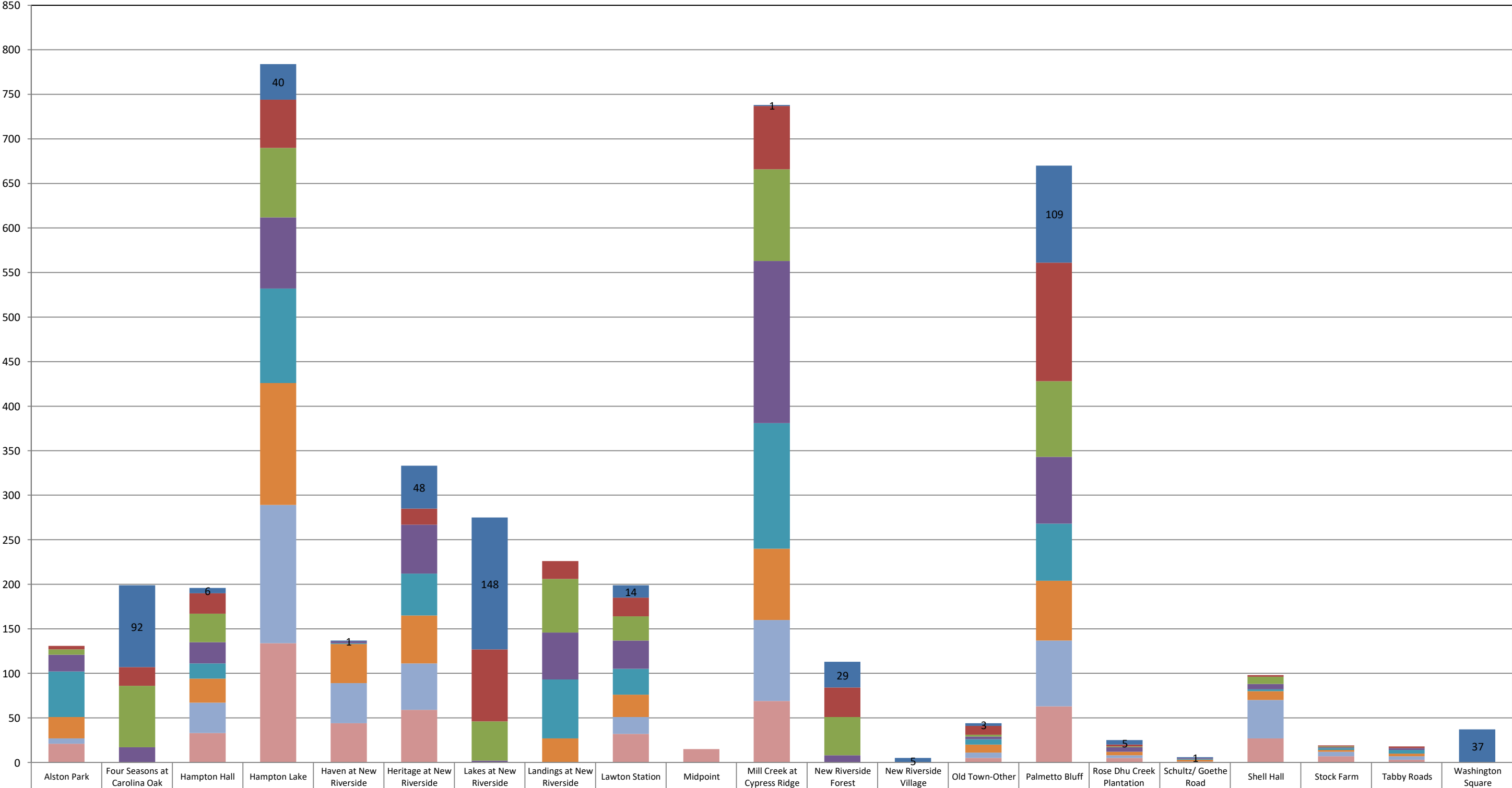
Town of Bluffton
New Single Family Residential Building Permits Issued by Neighborhood FY 2017 -2024



Town of Bluffton

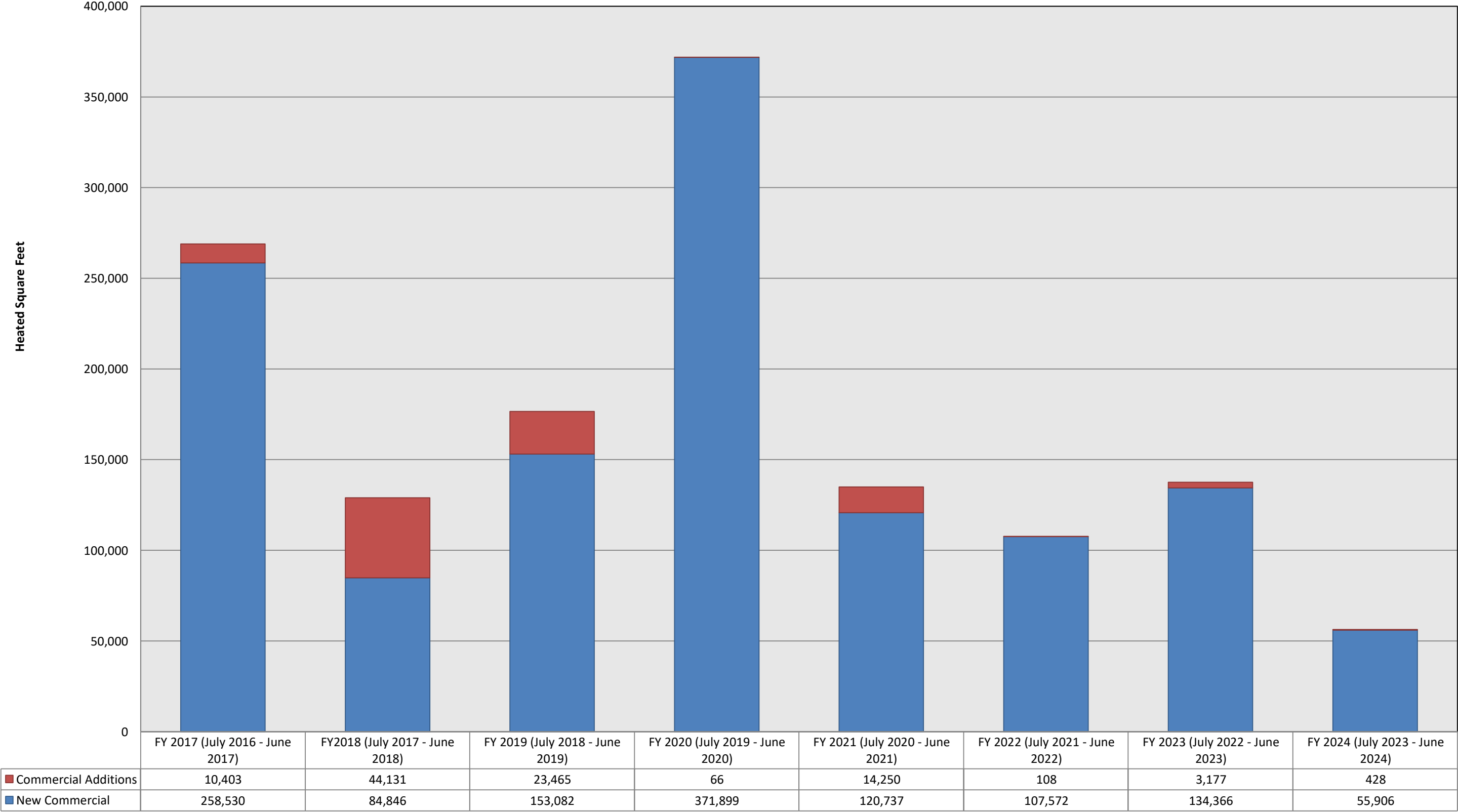
New Single Family Certificates of Occupancy Issued by Neighborhood FY 2017 - 2024

Number of New Housing Starts



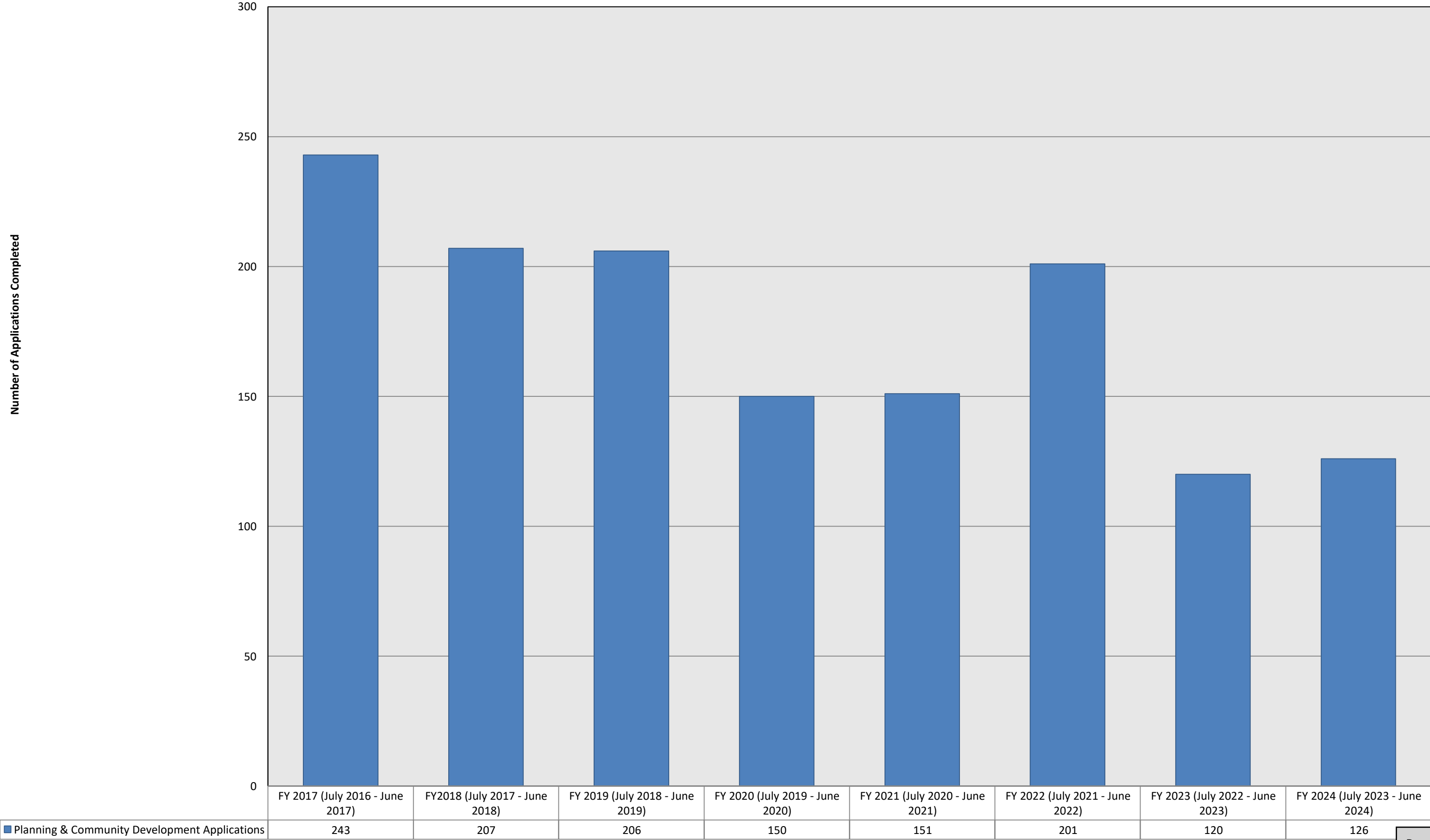
FY 2024 (July 2023 - June 2024)		92	6	40	1	48	148		14		1	29	5	3	109	5	1			37
FY 2023 (July 2022 - June 2023)	4	21	23	54		18	81	20	21		71	33		10	133	2		2	1	2
FY 2022 (July 2021 - June 2022)	6	69	32	78			44	60	27		103	43		2	85	1		8	1	
FY 2021 (July 2020 - June 2021)	19	17	24	80	2	55	2	53	32		182	8		3	75	5	1	6	1	2
FY 2020 (July 2019 - June 2020)	51		17	106	1	47		66	29		141			6	64		1	2	2	4
FY 2019 (July 2018 - June 2019)	24		27	137	44	54		27	25		80			9	67	4	2	10	2	3
FY2018 (July 2017 - June 2018)	6		34	155	45	52			19		91			6	74	3	1	43	5	4
FY 2017 (July 2016 - June 2017)	21		33	134	44	59			32	15	69			5	63	5		27	7	3

Town of Bluffton
New Commercial Construction and Additions Heated Square Footage
FY 2017 - 2024



Town of Bluffton
Planning & Community Development Applications Completed
FY 2017 - 2024

Number of Applications Completed

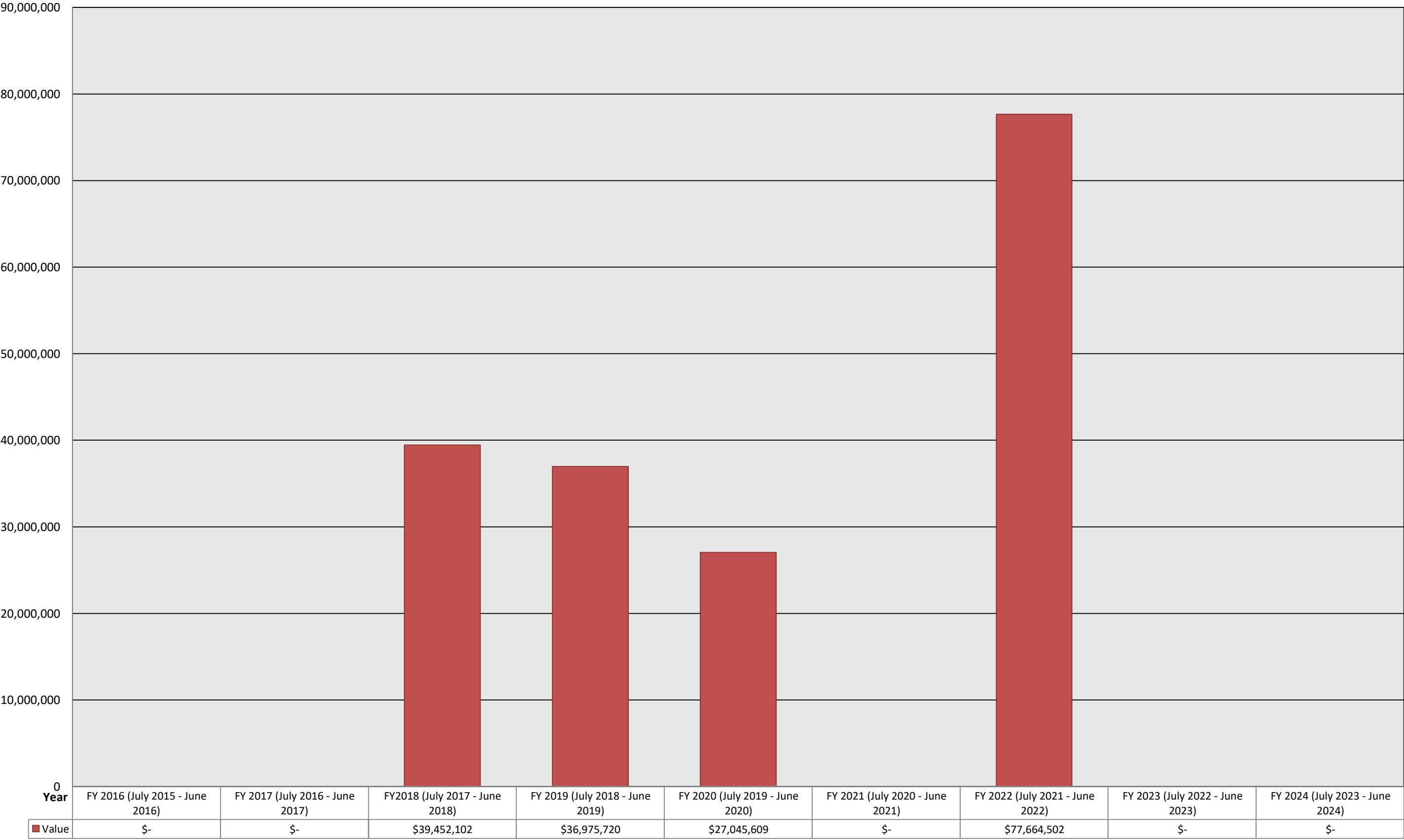


Town of Bluffton
Multi Family Apartments Value
FY 2017 - 2024

Attachment 8i

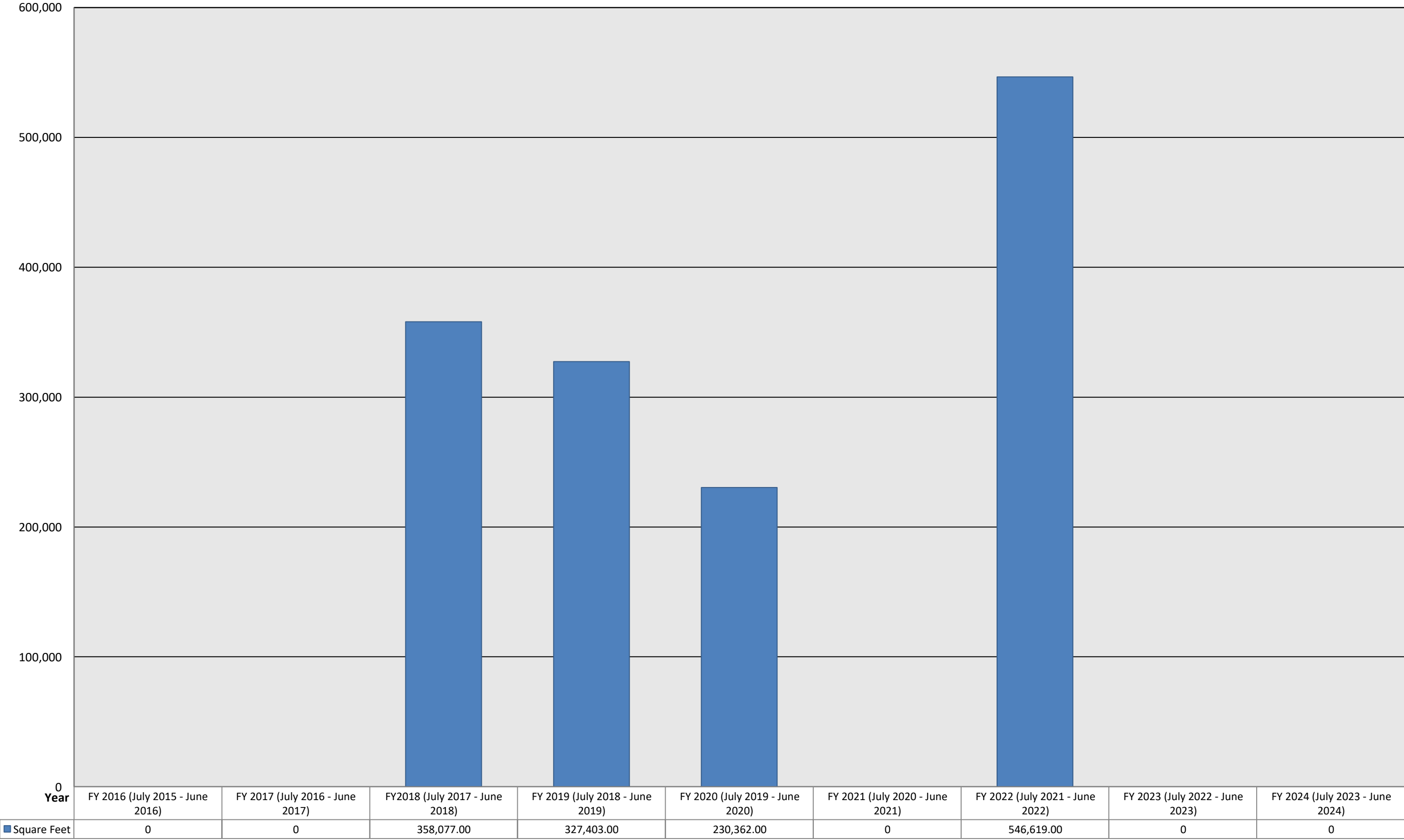
Section X. Item #1.

Value of Multi Family Apartments



Town of Bluffton
Multi Family Apartments Square Footage
FY 2017 - 2024

Square Footage of Multi Family Apartments

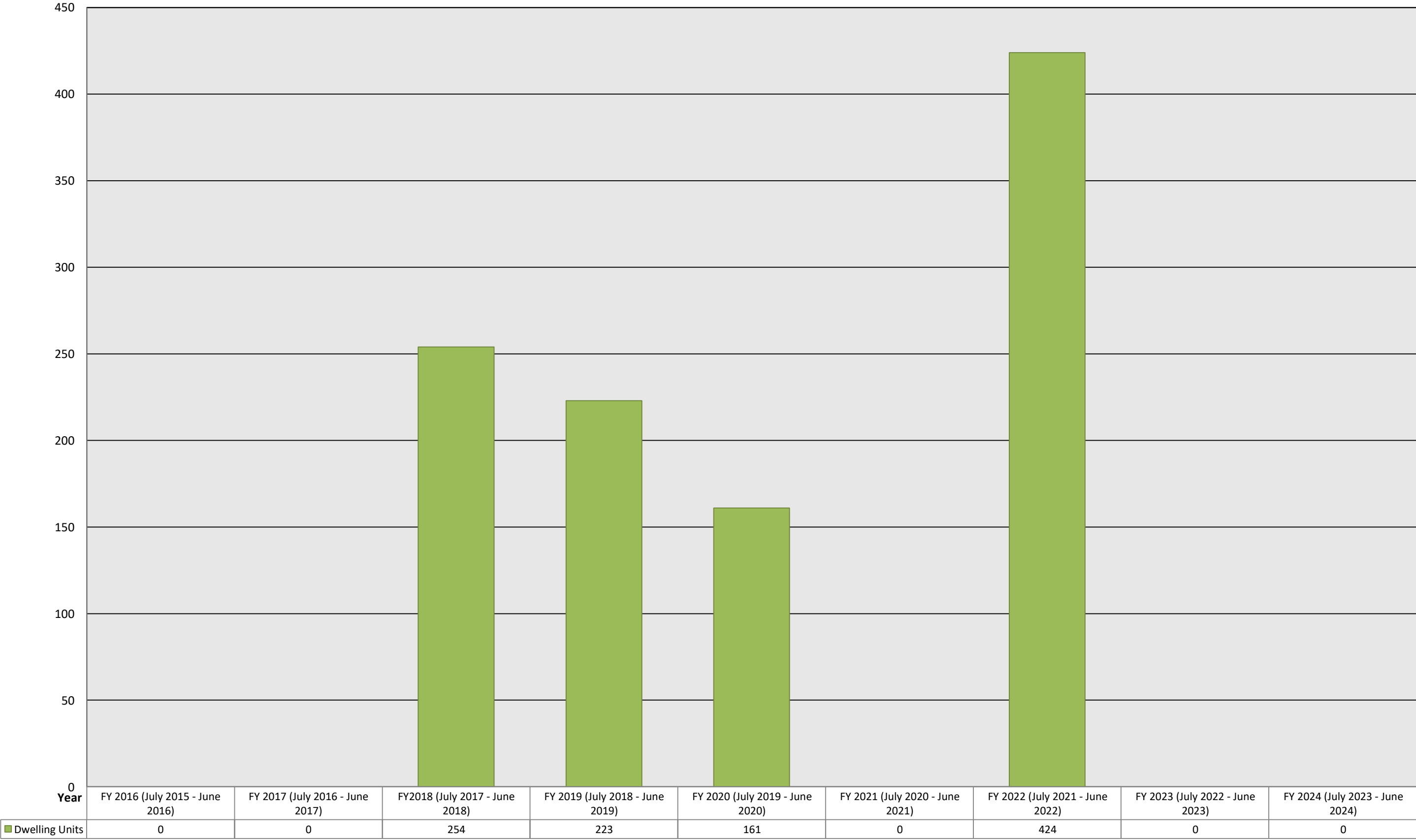


Town of Bluffton
Multi Family Apartments Total Units
FY 2017 - 2024

Attachment 8k

Section X. Item #1.

Multi Family Apartments Total Units





Growth Management Application Update Report

Town of Bluffton
Department of Growth Management
Office of Planning and Community Development
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section X. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Annexation Petition

100%

ANNX-03-24-019045	03/14/2024		Annexation Petition	Active	Aubrie Giroux
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Applicant: Bryant and Son Trucking Company **Owner:** Bryant and Son Trucking Company

PLAN DESCRIPTION: A request by the applicant and property owner Johnnie Bryant III, for approval of an annexation application. The property is located at 30 Davis Road and consists of approximately 2.14 acres identified by tax map number R600 029 000 0028 0000 and currently zoned T2R Rural in unincorporated Beaufort County. This application is associated with the following zoning map amendment request; ZONE-03-24-019046.

STATUS: This request will be heard at the May 22, 2024, Planning Commission Meeting as a Public Workshop item.

PROJECT NAME:

ANNX-11-23-018624	11/01/2023		Annexation Petition	Active	Aubrie Giroux
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Applicant: University Investments **Owner:** University Investments

PLAN DESCRIPTION: annexation and rezoning of parcel 12D , part of the Grande Oaks Property at the NW corner of the intersection of Buckwalter Pkwy and lake point Dr into buckwalter PUD. Annexation and rezoning of parcels 12D, 14A, 14 & 16. Part of the Grande Oaks Property at the NW corner of the intersections of Buckwalter Pkwy and Lake Point Dr into the Buckwalter PUD as Grande Oaks Commons. This application is associated with the following requests; COMP-01-24-018844, ZONE-01-24-018840 (Map), ZONE-02-24-018991 (Text), DAA-01-24-018842, and CPA-01-24-018845.

STATUS: Comments on the associated Concept Plan Amendment were heard at the March 27, 2024 meeting of the DRC. Awaiting re-submittal prior to sending all six applications to Planning Commission for a workshop.

PROJECT NAME:

Total Annexation Petition Cases: 2

Certificate of Appropriateness

Highway Corridor Overlay District



Growth Management Application Update Report

Attach

Section X. Item #1.

Town of Bluffton

Department of Growth Management

Office of Planning and Community Development

20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Certificate of Appropriateness

COFA-08-23-018438 08/30/2023 Certificate of Appropriateness Active Katie Peterson

Applicant: Architecture 101 **Owner:** Lee Lucier

PLAN DESCRIPTION: A request by Steven G. Stowers, AIA on behalf of James R. Richardson (Circle 46, LLC) for review of a Certificate of Appropriateness - Highway Corridor Overlay District application. The consists of 2 restaurant buildings, totaling approximately 5,125 SF, with approximately 875 SF of outdoor dining space and supporting infrastructure. The properties are zoned New Riverside Planned Unit Development and consists of approximately 1.32 acres identified by tax map number R610 036 000 3712 0000 located along Parkside Commons within the New Riverside Village Master Plan.

Status: The application will be placed on the October 4, 2023 Development Review Committee Agenda for review.

Status 10.4.23: The Application was heard at the 10.4. DRC. Awaiting Stormwater and Final DP review prior to submittal of a Final COFA application. PC members at the DRC meeting provided comment on Building B front elevation roofline, and expressed concern about pedestrian connection for the angled parking.

Status: The Application will be heard by the Planning Commission at the December 20, 2023 meeting.

Status 1.4.2024: The Application was approved with conditions at the 12.20.2023 PC meeting. Awaiting resubmittal addressing PC Conditions.

Status 2.16.2024: Email received requesting feedback on 1/10- items discussed were approvable. No plans submitted at this time. Awaiting resubmittal.

PROJECT NAME: NEW RIVERSIDE VILLAGE

COFA-08-22-017145 08/31/2022 6201 JENNIFER COURT Certificate of Appropriateness Active Katie Peterson

Applicant: Witmer Jones Keefer Ltd. **Owner:** Micheal Bradley Holdings LLC

PLAN DESCRIPTION: The River Dog Brewing project involves the construction of a ±50,000 SF two-story building, housing a brewing production facility, retail sales area, and restaurant/bar upon three existing lots on Jennifer Court at the intersection of Buck Island Road and May River Road. As a brief history – back in 2000 AEC permitted the Bright Commercial Subdivision master-planned for five individual commercial development parcels involving a new connector roadway between Buck Island Road and May River Road, incorporating both wet and dry utilities as well as storm drainage stub outs to each parcel. The development was designed, permitted and constructed under the Beaufort County development ordinance prior to annexation by the Town of Bluffton. Subsequently, Parker's convenience store was constructed upon two of the five parcels and, due to greater stormwater regulation, was required to provide additional water quality treatment consisting of shallow bioretention ponds/swales. The River Dog Brewing project parcels are identified as R600 039 000 0021 0000, R610 039 000 0756 0000, and R610 039 000 0757 0000. The property is zoned Neighborhood Core with the adjacent properties being the same.

STATUS[11.17.2022]: The application was approved with conditions at the November 16, 2022 Planning Commission meeting. Awaiting resubmitted documents addressing Planning Commission conditions.

7.18.23: Have not yet received resubmittal.

1.5.2024: Architectural items have been addressed by 1/5 resubmittal. Exempt plat, Development Plan and Lighting resubmittal still required.

PROJECT NAME: BUCK ISLAND/SIMMONSVILLE



Growth Management Application Update Report

Attach

Section X. Item #1.

Town of Bluffton

Department of Growth Management

Office of Planning and Community Development

20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Certificate of Appropriateness

COFA-03-23-017836 03/28/2023 45 SLATER ST STREET Certificate of Appropriateness Active Katie Peterson

Applicant: EIG14T RCCC 229 SC-Bluffton LLC

Owner: EIG14T BBMA SC BLUFFTON LLC

PLAN DESCRIPTION: A request by Samantha Kozlowski, Development Manager, on behalf of the owners, EIG14T BBMA SC BLUFFTON, LLC for approval of a Certificate of Appropriates – Highway Corridor Overlay. The project consists of the construction of a +/- 11,953 SF Big Blue Marble Academy (child care facility), along with the related infrastructure, landscaping and lighting. The site is identified by tax map number R614 028 000 5285 0000, located at the intersection of Mill Creek Blvd. and Okatie Highway and is zoned Cypress Ridge PUD.

STATUS [3/29/2023]: Applicant notified of incomplete submittal via email 3/29/23. Awaiting Resubmittal. No Final DP has been submitted, missing landscape plan, lighting plan, dumpster elevations, color board_

7.18.23: The Application was heard at the 6.28.23 Planning Commission meeting. It was tabled for the applicant to address PC comments. Awaiting resubmitted materials addressing PC comments prior to placing it back on the PC agenda.

10.23.23: The revised submittal has been placed on the 10.25.23 PC Agenda.

Approved. See attached.

Amendment submitted 5/8. Email sent to applicant that vents which have been placed on front elevation must be relocated to rear.

PROJECT NAME:

COFA-08-23-018440 08/31/2023 2411 OKATIE HWY HIGHWAY Certificate of Appropriateness Active Katie Peterson

Applicant: Witmer Jones Keefer Ltd.

Owner: Charlie and Brown

PLAN DESCRIPTION: A request by Dan Keefer on behalf of Charlie and Brown LLC for review of a Certificate of Appropriateness - Highway Corridor Overlay District application. The project consists of 10,000 SF of commercial/luxury car dealership space, 10,000 SF of clubhouse space, 5 buildings divided into 31 office/condos with a car garage underneath and associated infrastructure. The property is zoned Village at Verdier PUD and consists of approximately 5.00 acres, identified by tax map number R610-021-000-0808-0000 and located on Highway 170 approximately 1,200 feet south of Seagrass Station Road.

Status: The application will be placed on the October 4, 2023 Development Review Committee Agenda for review.

Status 10.4.2023: The Application was heard at the 10.4. DRC. Awaiting Stormwater and Final DP review prior to submittal of a Final COFA application. PC members at the DRC meeting provided comment on the mass and scale facing 170, and indicated that if they send an informal resubmittal prior to Final submittal, staff and DRC members of the PC could provide feedback.

Status: Application is slated for the January 24 PC Agenda.

Status: The application was approved with conditions at the 1.24.2024 PC meeting. Awaiting resubmitted materials addressing PC conditions.

DRC Okay with revised windows. Awaiting color board/materials for all buildings and DP Approval.

PROJECT NAME:



Growth Management Application Update Report

Town of Bluffton
Department of Growth Management
Office of Planning and Community Development
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section X. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Certificate of Appropriateness

COFA-01-24-018868	01/17/2024	1 JCS CV COVE	Certificate of Appropriateness	Active	Katie Peterson
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Applicant: Pearce Scott Architects

Owner: GOF, LLC

PLAN DESCRIPTION: A request by Pearce Scott Architects, on behalf of the Owner, Jim Saba, for a review of a Certificate of Appropriateness - HD to construct a new 2-story recreation building of approximately 2,915SF to be located at 1 JCs Cove, identified by tax map number R610 039 000 1129 0000, zoned Agricultural, and located within the Highway Corridor Overlay district.

Status: The Conceptual Application was heard by the DRC at their February 21, 2024 meeting and comments provided to applicant. Awaiting final submittal.

PROJECT NAME: JC'S COVE

Historic District

COFA-03-24-019047	03/15/2024	34 TABBY SHELL RD ROAD	Certificate of Appropriateness	Active	Katie Peterson
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Applicant: Clear Cut Construction

Owner: William Glover

PLAN DESCRIPTION: A request by Clear Cut Construction, on behalf of the owner, William Glover, for the review of a Certificate of Appropriateness-HD to allow the construction of a new 2-story Single Family Residential Structure of approximately 2,325 SF and Carriage House structure of approximately 1,174 SF, located at 34 Tabby Shell Road, Lot 18 in the Tabby Roads Development, in the Old Town Bluffton Historic District, within the Neighborhood General - HD zoning district.

Status: The Application was heard at the April 15, 2024 HPRC meeting where comments were provided to the Applicant. Awaiting Final Submittal.

PROJECT NAME: TABBY ROADS PHASE 1



Growth Management Application Update Report

Town of Bluffton
Department of Growth Management
Office of Planning and Community Development
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section X. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Certificate of Appropriateness

COFA-04-24-019080 04/08/2024 113 BRIDGE STREET Certificate of Appropriateness Active Glen Umberger

Applicant: Court Atkins Architects, Inc.

Owner: William Gary Roe, RVOC TR

PLAN DESCRIPTION: The Tison-Derst Cottage is a contributing structure and is one of several structures located at 113 Bridge Street. The Owner is allowing this application on behalf of prospective owners Chris and Christine Murphy.

The application is a request to relocate the Tison-Derst Cottage approximately 339'-0" to the North and 13'-6" to the East. The cottage stays on 113 Bride Street and would maintain the same orientation to the river.

UPDATE: Application reviewed at HPRC on 05.06.2024 and applicant provided with staff/HPRC comments; will wait for final submission (due 05.08.2024 for consideration at the next HPC meeting on 06.05.2024)

UPDATE: Public Notice Sign Installed 05.15.2024

PROJECT NAME: OLD TOWN

COFA-11-21-016057 11/04/2021 58 CALHOUN ST Certificate of Appropriateness Active Katie Peterson

Applicant: Court Atkins Architects Inc

Owner: May River Montessori

PLAN DESCRIPTION: Awaiting resubmittal:

A request by Court Atkins Architects, Inc., on behalf of the owner, May River Montessori, for review of a Certificate of Appropriateness- HD to allow the construction of a new 2-story building of approximately 5,800 SF located at 58 Calhoun Street, in the Old Town Bluffton Historic District and zoned Neighborhood Center-HD.

STATUS [11/5/2021]: The application is currently being reviewed by Staff for conformance with the Unified Development Ordinance (UDO), Traditional Construction Patterns, and any development plans associated with the parcel and is scheduled for review by the HPRC at the December 6, 2021 meeting.

STATUS [12/8/2021]: The application was reviewed at the December 6, 2021 HPRC meeting and comments were provided to the Applicant. Staff is awaiting the approval of the Development Plan and submission of a final application for full HPC review.

STATUS [1.20.2023]: A Final Application has been received and the item is slated to be heard at the February 1, 2023 HPC meeting.

STATUS 2.1.2023: The Application was approved with conditions at the 2.1.23 HPC meeting. Staff is awaiting submittal of revised documents addressing all HPC Conditions.

3.27.2023: Revision received - Landscape Plan not in compliance and does not match DP. DP still not approved.

PROJECT NAME: OLD TOWN



Growth Management Application Update Report

Attachment

Section X. Item #1.

Town of Bluffton
Department of Growth Management
Office of Planning and Community Development
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Certificate of Appropriateness					
COFA-04-24-019070	04/01/2024	42 WHARF ST STREET	Certificate of Appropriateness	Active	Katie Peterson
Applicant: John Montgomery		Owner: John Montgomery			
PLAN DESCRIPTION: A request by John Montgomery for the review of a Certificate of Appropriateness-HD to allow the construction of a new 2-story Single Family Structure of approximately 2,120 SF and 2-story Carriage House structure of approximately 1,120 SF, to be located at 42 Wharf Street, in the Old Town Bluffton Historic District, within the Neighborhood General - HD zoning district. Status: The Application was heard at the 4.22.2024 HPRC meeting, awaiting final submittal.					
PROJECT NAME: OLD TOWN					
COFA-05-24-019129	05/10/2024	5783 YAUPON RD ROAD	Certificate of Appropriateness	Active	Katie Peterson
Applicant: Southern Coastal Homes		Owner: Nathalie and Andrew Hintz			
PLAN DESCRIPTION: A request by Southern Coastal Homes, on behalf of the Owners Nathalie and Andrew Hintz, for review of a Certificate of Appropriateness - HD to construct a new 1-story Single Family Residential Structure of approximately 1,818 SF and Carriage House of approximately 1,165 SF at 5783 Yaupon Road, Lot 38 in the Stock Farm Development, in the Old Town Bluffton Historic District and zoned Neighborhood General-HD. Status: The application is under review and will be heard at the June 10, 2024 HPRC meeting.					
PROJECT NAME: OLD TOWN					
COFA-05-24-019123	05/09/2024	128 BRIDGE ST STREET	Certificate of Appropriateness	Active	Katie Peterson
Applicant: Manuel Studio, LLC		Owner: Lynda Strong			
PLAN DESCRIPTION: A request by Ansley H Manuel, Architect, on behalf of the Owner Lynda Lee Googe Strong, for review of a Certificate of Appropriateness - HD to construct a new 2-story Carriage House at 128 Bridge Street, in the Old Town Bluffton Historic District and zoned Neighborhood Conservation-HD. Status: Application is being reviewed and will be heard at the 6/3/2024 HPRC meeting.					
PROJECT NAME: OLD TOWN					



Growth Management Application Update Report

Town of Bluffton
Department of Growth Management
Office of Planning and Community Development
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section X. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Certificate of Appropriateness

COFA-04-23-017854	04/03/2023	5824 GUILFORD PLACE	Certificate of Appropriateness	Active	Katie Peterson
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Applicant: Pearce Scott Architects **Owner:** 5824 Guilford Place LLC

PLAN DESCRIPTION: A request by Pearce Scott Architects, on behalf of the owner, 5824 Guilford Place LLC (Larry Page), for review of a Certificate of Appropriateness - HD for a proposed 2-story commercial office building of approximately 2,888 SF and Carriage House of approximately 1,200 SF to be located at 5824 Guilford Place, Lot 14 in the Stock Farm Development, in the Old Town Bluffton Historic District and zoned Neighborhood General- HD.

STATUS [4.4.23]: Conceptual Application has been received and is projected to be reviewed at the May 1, 2023 Historic Preservation Review Committee Meeting.

STATUS 6.9.23: The Final Application is slated to be heard at the 7.5.2023 meeting of the HPC.

STATUS 7.6.2023: The Application was approved with conditions at the 7.5.2023 HPC Meeting. Staff is awaiting resubmitted, revised materials addressing HPC Conditions.

Status 1/3/2024 -Architecture and building placement have been addressed - awaiting resubmittal showing grading will not effect street scape and plantings and tree removal permit to be submitted. Note - Large Canopy trees on LS plan need to be min 12' in height at time of planting - shown as 8-10.

PROJECT NAME: OLD TOWN

COFA-01-24-018816	01/05/2024	22 BRUIN RD ROAD	Certificate of Appropriateness	Active	Katie Peterson
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Applicant: Sean Lewis **Owner:** Bertha Wooten

PLAN DESCRIPTION: A request by Sean A. Lewis, on behalf of the Owner, Bertha Wooten, for a review of a Certificate of Appropriateness - HD to construct a new 1-story of approximately 1,695 with attached Carriage House of approximately 697 SF, to be located at 22 Bruin Road, in the Old Town Bluffton Historic district and zoned Neighborhood General- HD zoning District.

Status 1.5.2024: The Application is being reviewed and will be placed on the 1/29/2024 HPRC Agenda.

Status 1.30.24: Comments provided to the applicant. Awaiting final submittal.

PROJECT NAME: OLD TOWN



Growth Management Application Update Report

Town of Bluffton
Department of Growth Management
Office of Planning and Community Development
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment Section X. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Certificate of Appropriateness

COFA-07-22-017007	07/26/2022	30 LAWRENCE ST	Certificate of Appropriateness	Active	Glen Umberger
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Applicant: Robert Breger **Owner:** Robert Breger

PLAN DESCRIPTION: A request by Robert Breger for review of a Certificate of Appropriateness- HD to allow the construction of a new 2 story Carriage House of approximately 1,200 SF located at 30 Lawrence Street in the Old Town Bluffton Historic District and zoned Neighborhood General-HD.

Status: The Application will be heard at the August 22, 2022 meeting of the HPRC.

STATUS [8.24.2022]: The application was reviewed at the 8.22.2022 HPRC meeting and comments were provided to the Applicant. Staff is awaiting the submission of a final application for full HPC review.

STATUS (01.13.2023): The application was heard at HPC on 12.7.2022 and approved with conditions (see attached approval letter). Conditions outlined in letter will need to be met for permit to be issued.

PROJECT NAME: OLD TOWN

COFA-06-22-016820	06/02/2022	41 STOCK FARM RD	Certificate of Appropriateness	Active	Katie Peterson
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Applicant: Dylan and Amanda Mingard **Owner:** Dylan and Amanda Mingard

PLAN DESCRIPTION: A request by Dylan and Amanda Mingard for review of a Certificate of Appropriateness- HD to allow the construction of a new 2-story single-family residential structure of approximately 2,593 SF located at 41 Stock Farm Road in the Old Town Bluffton Historic District and zoned Neighborhood Conservation-HD.

STATUS [6/2/2022]: The application is currently being reviewed by Staff for conformance with the Unified Development Ordinance (UDO), Traditional Construction Patterns, and any development plans associated with the parcel and is scheduled for review by the 6/27/2022 HPRC at the meeting.

STATUS [8.8.2022]: The application was reviewed at the 6.27.2022 HPRC meeting and comments were provided to the Applicant. Staff is awaiting Final Submittal for review by the HPC.

STATUS [10.18.2022]: A Final Application has been received and is slated to be heard by the HPC at their November 2nd meeting.

STATUS: Application approved with conditions at 11.02.2022 HPC. Awaiting resubmitted documents addressing HPC conditions.

STATUS: Approved - Revised landscape plan to save tree. See attached

Columns OK to have 1x caps and bases, sidewalk to tie into drive rather than straight to street to accommodate swale.

PROJECT NAME: OLD TOWN



Growth Management Application Update Report

Attach

Section X. Item #1.

Town of Bluffton
Department of Growth Management
Office of Planning and Community Development
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Certificate of Appropriateness					
COFA-03-24-019041	03/11/2024	28 STOCK FARM RD ROAD	Certificate of Appropriateness	Active	Katie Peterson
Applicant: RFD Construction LLC		Owner: Hunter & Suzi Hansen			
<p>PLAN DESCRIPTION: A request by RFD Construction, on behalf of the owner, Hunter H Hansen and Sue A Hansen, for the review of a Certificate of Appropriateness-HD to allow the construction of a new 1.5-story Single Family Residential Structure of approximately 2,619 SF Carriage House structure of approximately 1,123 SF, located at 28 Stock Farm Road, Lot 33 in the Stock Farm Development, in the Old Town Bluffton Historic District, within the Neighborhood General - HD zoning district.</p> <p>Status: The Application was heard at the April 8, 2024 HPRC meeting where comments were provided to the Applicant. Awaiting Final submittal.</p> <p>Status: The Application will be heard at the June 5, 2024 HPC meeting.</p>					
PROJECT NAME:		OLD TOWN			
COFA-05-24-019119	05/07/2024	35 C THOMAS HEYWARD ST STREET	Certificate of Appropriateness	Active	Katie Peterson
Applicant: Brad Clark		Owner: Brad Clark			
<p>PLAN DESCRIPTION: A request by Brad Clark for review of a Certificate of Appropriateness- HD for the renovation of the existing single family structure to move the front door and patio stairs to the center of the house and reconfigure the windows on the front and left elevations at 35 C Thomas Heyward Street, in the Old Town Bluffton Historic District and zoned Neighborhood General-HD.</p> <p>Status: The Application will be heard at the June 3, 2024 HPRC meeting.</p>					
PROJECT NAME:		OLD TOWN			
COFA-09-23-018501	09/22/2023	1255 MAY RIVER RD ROAD	Certificate of Appropriateness	Active	Katie Peterson
Applicant: Pearce Scott Architects		Owner: BC Distillery Holdings LLC			
<p>PLAN DESCRIPTION: A request by Pearce Scott Architects, on behalf of the Owner, Billy Watterson, for review of a Certificate of Appropriateness - HD to allow the construction of a new 3,517 SF 2-story restaurant building and a 1,200 SF restaurant Carriage House structure identified as Buildings 1 and 2 in the Ma Daisy's Porch Development Plan, on the parcel currently addressed as 1255 May River Road, in the Old Town Bluffton Historic District and zoned Neighborhood General - HD.</p> <p>Status: The Application will be heard at the 10.9.2023 HPRC meeting.</p> <p>10.10.2023: The application was heard at the 10.9 HPRC meeting where comments were provided to the Applicant. Awaiting final submittal.</p> <p>Status: The Application was heard at the 12/6/23 HPC meeting and was approved with conditions. Awaiting resubmittal addressing HPC conditions.</p> <p>Status Approved.</p>					
PROJECT NAME:		OLD TOWN			



Growth Management Application Update Report

Town of Bluffton
Department of Growth Management
Office of Planning and Community Development
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment Section X. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Certificate of Appropriateness

COFA-05-24-019155	05/24/2024	68 PRITCHARD ST STREET	Certificate of Appropriateness	Active	Dan Frazier
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Applicant: Tony Pressley **Owner:** Tony & Alyssa Pressley

PLAN DESCRIPTION: Pressley carriage House

PROJECT NAME: OLD TOWN

COFA-11-23-018694	11/28/2023	1 BLUE CRAB STREET	Certificate of Appropriateness	Active	Katie Peterson
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Applicant: Court Atkins **Owner:** Palmetto Pops

PLAN DESCRIPTION: A request by Court Atkins Group, on behalf of the owner, April Perez, for a review of a Certificate of Appropriateness - HD to construct a new 2.5 story live/work building of approximately 3,180 SF with business and production facility on the first floor and a 1 1/2 story residential unit above and a 2-story Carriage House of approximately 1,060 SF, to be located at 1 Blue Crab Street, Lot 27 in the Tabby Roads Development, in the Old Town Bluffton Historic district and zoned Neighborhood General - HD zoning District.

Status: Application is on HOLD. See attached email.

STATUS 5.10.2024: Hold has been removed and application has been placed on the May 20, 2024 HPRC Agenda.

Status 5.21.2024: Application was heard at the May 20th HPRC meeting where comments were provided to the applicant. Awaiting final submittal.

PROJECT NAME: OLD TOWN

Total Certificate of Appropriateness Cases: 20

Comprehensive Plan Amendment

Comprehensive Plan Amendment



Growth Management Application Update Report

Attach

Section X. Item #1.

Town of Bluffton
Department of Growth Management
Office of Planning and Community Development
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Comprehensive Plan Amendment

COMP-01-24-018844	01/11/2024		Comprehensive Plan Amendment	Active	Aubrie Giroux
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Applicant: University Investments

Owner: University Investments

PLAN DESCRIPTION: Town Comprehensive Plan Amendment of the Future Land Use Map. This application is associated and will run concurrently with University Investment's applications for annexation, rezoning, Buckwalter PUD Text Amendment to create a new Land Use Tract to be known as Grande Oaks Commons, Buckwalter Development Agreement Amendment, and Buckwalter Concept Plan Amendment for parcels 12D, 14A, 14 & 16 which are currently part of the Grande Oaks PUD and located at the NW corner of the intersections of Buckwalter Pkwy and Lake Point Drive. This application is associated with the following requests; ANNEX-11-23-018624, CPA-01-24-018845, ZONE-01-24-018840 (Map), ZONE-02-24-018991 (Text), and DAA-01-24-018842.

STATUS: Comments on the associated Concept Plan Amendment were heard at the March 27, 2024 meeting of the DRC. Awaiting re-submittal prior to sending all six applications to Planning Commission for a workshop.

PROJECT NAME:

COMP-05-24-019139	05/16/2024		Comprehensive Plan Amendment	Active	Aubrie Giroux
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Applicant: Town of Bluffton

Owner: Town of Bluffton

PLAN DESCRIPTION: A request for Comp Plan Amendment for approximately 2.14 acres located at 30 Davis Road and identified by Beaufort County Tax Map No. R600 029 000 0028 0000 to rezone the subject property to the Residential General (RG) District

PROJECT NAME:

Total Comprehensive Plan Amendment Cases: 2

Concept Plan Amendment

Concept Plan Amendment



Growth Management Application Update Report

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Town of Bluffton

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Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Concept Plan Amendment

CPA-01-24-018845 01/11/2024 Concept Plan Amendment Active Dan Frazier

Applicant: University Investments **Owner:** University Investments

PLAN DESCRIPTION: A request by the property owner, Jake Reed of University Investments LLC, for approval of a concept plan amendment. The applicant is requesting to amend the Buckwalter Tract Development Agreement and Concept Plan to add 65.59 acres as Grande Oaks Commons, including an additional 32.0 acres of General Commercial acreage. The properties are currently zoned Grande Oaks Planned Unit Development in unincorporated Beaufort County and consist of 65.59 acres identified by tax map numbers R600-029-000-2410-0000 and R600-029-000-0014-0000 located in the northwest corner of the intersection of Buckwalter Parkway and Lake Point Drive. This application is associated with the following requests; ANN-11-23-018624, COMP-01-24-018844, ZONE-01-24-018840 (Map), ZONE-02-24-018991 (Text), and DAA-01-24-018842.

STATUS: Comments on this application were heard at the March 27, 2024 meeting of the DRC. Awaiting re-submittal prior to sending all six applications to Planning Commission for a workshop.

PROJECT NAME:

Total Concept Plan Amendment Cases: 1

Development Agreement

Development Agreement

DA-01-24-018842 01/11/2024 Development Agreement Active Aubrie Giroux

Applicant: University Investments **Owner:** University Investments

PLAN DESCRIPTION: Annexation and rezoning of parcels 12D, 14A, 14 & 16. Part of the Grande Oaks Property at the NW corner of the intersections of Buckwalter Pkwy and Lake Point Dr into the Buckwalter PUD as Grande Oaks Commons. This application is associated with the following requests; ANN-11-23-018624, CPA-01-24-018845, ZONE-01-24-018840 (Map), ZONE-02-24-018991 (Text), and COMP-01-24-018844.

STATUS: Comments on the associated Concept Plan Amendment were heard at the March 27, 2024 meeting of the DRC. Awaiting re-submittal prior to sending all six applications to Planning Commission for a workshop.

PROJECT NAME:



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Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Total Development Agreement Cases: 1

Development Plan

Development Plan

DP-10-23-018541	10/05/2023	3000 BIG HOUSE PLANTATION ROAD	Development Plan	Active	Dan Frazier
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Applicant: Thomas & Hutton - USE THIS ACCOUNT

Owner:

PLAN DESCRIPTION: A request by Drew Lonker of Thomas & Hutton, on behalf of Palmetto Bluff Uplands, LLC, for approval of a preliminary development plan. The project consists of general clearing, installation of water and sewer utilities, 2 sanitary sewer pump stations, dry utilities, storm drainage infrastructure and a pervious paver roadway to serve the proposed 31 single-family residential lots. The property is zoned Palmetto Bluff Planned Unit Development and consists of +/- 52.8 acres identified by tax map numbers R614 057 000 0001 0000 and R614 058 000 0001 0000, located east of the intersection of Old Anson Road and Bighouse Plantation Road, and includes Long Island and the adjacent causeway.
STATUS 11/9/23: Staff comments on the preliminary development plan application were heard at the November 8, 2023, meeting of the DRC. Awaiting final development plan submittal.

PROJECT NAME: Palmetto Bluff

DP-01-24-018847	01/12/2024		Development Plan	Active	Dan Frazier
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Applicant: Thomas & Hutton - USE THIS ACCOUNT

Owner: Pulte

PLAN DESCRIPTION: A request by the property owner Richard Loudin of Pulte Home Company for approval of a preliminary development plan. The project consists of 46 single family residential lots, open space, and associated infrastructure. The property is zoned New Riverside Planned Unit Development and consists of approximately 19.0 acres identified by tax map number R610 044 000 0012 0000 located within the Midpoint at New Riverside Initial Master Plan.
STATUS: Comments for this item were heard at the February 21, 2024, meeting of the DRC. Awaiting final development plan submittal.

PROJECT NAME: MIDPOINT AT NEW RIVERSIDE



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Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Development Plan					
DP-12-22-017474	12/09/2022	17 BUCKHEAD BAY ROAD	Development Plan	Active	Dan Frazier
Applicant: Thomas & Hutton - USE THIS ACCOUNT		Owner: Dan Kunau			
<p>PLAN DESCRIPTION: A request by John Paul Moore of Thomas & Hutton, on behalf of the property owner Citadel Bluffton, LLC for approval of a preliminary development plan. The project consists of the construction of one (1) 44,400 S.F. contractor building and associated infrastructure. The property is zoned Palmetto Bluff Planned Unit Development and consists of +/- 4.8 acres identified by tax map numbers R614 045 000 0643 0000 and R614 046 000 0062 0000 located within the Palmetto Bluff Tract Master Plan.</p> <p>Status: The preliminary development plan application was heard at the January 18, 2023, DRC Meeting.</p> <p>Status: The final development plan application was heard at the May 1, 2024, meeting of the DRC. Awaiting resubmittal.</p>					
PROJECT NAME:		PALMETTO BLUFF			
DP-03-24-019033	03/08/2024	224 MORELAND ROAD	Development Plan	Active	Dan Frazier
Applicant: Thomas & Hutton - USE THIS ACCOUNT		Owner: Palmetto Bluff Uplands, LLC / May River Forest, LLC			
<p>PLAN DESCRIPTION: A request by Drew Lonker of Thomas & Hutton, on behalf of May River Forest, LLC, for approval of a preliminary development plan application. The project consists of creating 26 single family lots with associate infrastructure. The property is identified by tax map numbers R614-045-000-0024-0000, R614-046-000-0062-0000, R614-052-000-0059-0000, R614-057-000-0001 -0000, R614-057-000-0002-0000 and consists of 48.9 acres located along Old Moreland Road within the Palmetto Bluff PUD.</p> <p>Status: Staff comments on the Preliminary Plan will be heard at the April 17, 2024 meeting of the DRC.</p>					
PROJECT NAME:					
DP-02-23-017662	02/09/2023	1215 MAY RIVER ROAD	Development Plan	Active	Dan Frazier
Applicant: Ward Edwards, Inc. - USE THIS ACCOUNT		Owner: ERB Enterprises, LLC			
<p>PLAN DESCRIPTION: A request by Anna Petitgout of Ward Edwards Engineering on behalf of Ed Goeas of ERB Enterprises LLC for approval of a preliminary development plan application. The applicant proposes to construct site infrastructure, including an internal streetscape, drives, parking, walks, utilities, drainage, and stormwater to serve four mixed-use lots, one commercial lot and four residential lots. The subject property contains three lots zoned Neighborhood General – HD (NG-HD), one lot zoned Neighborhood Core (NC), and two lots zoned Residential General (RG) and consists of 3.43 acres identified by tax map numbers R610 039 000 0114 0000, R610 039 000 0093 0000, R610 039 000 0094 0000, R610 039 000 0095 0000, R610 039 000 0096 0000, R610 039 000 0107 0000 located at 1203 – 1217 May River Road and 15 - 19 Jason Street,</p> <p>STATUS: Comments on the preliminary development plan were reviewed at the June 14, 2023, meeting of the DRC.</p> <p>STATUS: The preliminary development plan was approved at the September 27, 2023, Planning Commission meeting. Awaiting final development plan submittal.</p>					
PROJECT NAME:		VAUX PROPERTY			



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Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Development Plan

DP-09-23-018499 09/21/2023 26 BRUIN RD ROAD Development Plan Active Dan Frazier

Applicant: Maria Drawdy **Owner:** Alljoy DC, LLC

PLAN DESCRIPTION: A request by Maria Drawdy on behalf of Troy Derda for approval of a preliminary land development application. The project consists of a two story building with a donut shop on the first floor and a residential unit on the second floor, associated parking and infrastructure. The property is identified by tax map number R610 039 00A 0416 0000 and consists of .21 acres located at 26 Bruin Road in the Neighborhood General Historic District.

STATUS: Comments on the preliminary development plan were heard at the October 25, 2023 DRC Meeting.

STATUS: The preliminary development plan was resubmitted on 11/20/23.

STATUS: The Preliminary Development Plan was approved at the 12/20/23 Planning Commission Meeting. Awaiting final development plan submittal.

PROJECT NAME: OLD TOWN

DP-01-23-017616 01/27/2023 17 BUCKHEAD BAY ROAD Development Plan Active Dan Frazier

Applicant: Thomas & Hutton - USE THIS ACCOUNT **Owner:**

PLAN DESCRIPTION: A request by John Paul Moore of Thomas & Hutton, on behalf of the property owner Citadel Bluffton, LLC for approval of a preliminary development plan. The project consists of the construction of one (1) 40,750 S.F. first floor and 30,000 S.F. second floor building consisting of storage units and 30 covered parking spaces. The property is zoned Palmetto Bluff Planned Unit Development and consists of +/- 3.2 acres identified by tax map number R614 046 000 0643 0000 located within the Palmetto Bluff Tract Master Plan.

Status: The preliminary development plan application was heard at the March 1, 2023 DRC meeting.

Status: Comments on the final development plan application were heard at the November 15, 2023, DRC meeting. Awaiting re-submittal.

PROJECT NAME:



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Active Cases					

Development Plan

DP-05-23-018081 05/23/2023 Development Plan Active Dan Frazier

Applicant: Sturre Design & Development, LLC

Owner:

PLAN DESCRIPTION: A request by Jen Townsley of Palmetto Coastal Landscaping, on behalf of Hampton Lake Community Association, Inc., for the approval of a preliminary Development Plan. The project proposes to construct an enclosed storage area including a gravel storage yard, gravel access drive, stormwater BMP, and water service to utilize as vehicle and equipment storage for landscaping operations. The property is zoned Buckwalter PUD and consists of approximately 10.9 acres, identified by tax map number R614-029-000-1985-0000 located on Parklands Drive within the Brightwater Master Plan.

STATUS: Staff comments were heard at the June 28, 2023, meeting of the DRC. Awaiting re-submittal.

STATUS: The preliminary development plan was resubmitted on 11/22/23.

STATUS: The Preliminary Development Plan was approved at the 12/20/23 Planning Commission Meeting. Awaiting final development plan submittal.

PROJECT NAME:

DP-08-22-017074 08/12/2022 Development Plan Active Dan Frazier

Applicant: Thomas & Hutton

Owner:

PLAN DESCRIPTION: A request by Michael Hughes of Thomas & Hutton on behalf of May River Forest, LLC for approval of a development plan. The project consists of the general clearing, installation of utilities, drainage, grading and paving for +/- 5 miles of Old Anson Road beginning near the intersection of Old Moreland Road and Big House Landing Road and terminating on Big House Island near the Anson Marina. The property is zoned Palmetto Bluff PUD and consists of approximately 110.0 acres identified by tax map numbers R614 046 000 0062 0000, R614 052 000 0059 0000, R614 045 000 0024 0000, R614 045 000 0026 0000, and R614 057 000 0001 0000 located within the Palmetto Bluff Master Plan.

STATUS: Staff comments were reviewed at the September 14, 2022 meeting of the DRC.

STATUS: The final development plan application was submitted on May 19, 2023. Comments on the FDP submittal were reviewed at the June 21, 2023, meeting of the DRC. Awaiting re-submittal addressing FDP Staff Comments.

PROJECT NAME:



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Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Development Plan					
DP-10-22-017341	10/21/2022	110 PALMETTO BLUFF ROAD	Development Plan	Active	Dan Frazier
Applicant: Thomas & Hutton		Owner: Cleland Site Prep			
<p>PLAN DESCRIPTION: A request by John Paul Moore of Thomas & Hutton on behalf of Pritchard Farm, LLC for approval of a development plan. The project consists of 10 single family residential lots, open space, and associated infrastructure. The property is zoned New Riverside Planned Unit Development and consists of approximately 38 acres identified by tax map numbers R610 044 000 0136 0000, R610 044 000 0141 0000, R600 045 000 0001 0000, R610 044 000 0002 0000, R614 045 000 0052 0000, R614 045 000 0578 0000 and R600 045 000 0012 0000 located within Parcel 9 of the New Riverside Concept Master Plan.</p> <p>STATUS UPDATE: Staff comments on the preliminary development plan were heard at the November 30, 2022 meeting of the DRC.</p> <p>STATUS: The final development plan application will be heard at the May 1, 2024, meeting of the DRC.</p>					
PROJECT NAME:					
DP-07-21-015654	07/27/2021		Development Plan	Active	Dan Frazier
Applicant: EMC Engineering Services, Inc.		Owner: Hlyer Ground Veterinary Service, Inc.			
<p>PLAN DESCRIPTION: The proposed development, Lot 6, will have a two-story veterinary office building for a total of 9000 sf (4500 sf each floor). Parking will be provided on-site. Dumpster to be provided on-site. Water and sewer will be provided by BJWSA. Utilities appear to be stubbed out to the site and site looks to be pad ready. Access will be provided off Buckwalter Place Blvd. The parcel has 2 existing curb cuts. One will be utilized and the other will have to be relocated to work better with the site plan. See attached site plan. Detention will be provided off-site on adjacent parcel 7 in an existing detention pond that was planned previously for this parcel.</p> <p>The Preliminary Plan will be presented to the Planning Commission on Oct 27, 2021.</p> <p>STATUS 05-09-2022: This item was approved at the 10-27-21 Planning Commission meeting. Awaiting Final Plan submittal documents.</p> <p>STATUS 10/05/23: The applicant has requested an extension of the approved Preliminary Development Plan. In accordance with Section 3.10.5 of the Unified Development Ordinance, an extension of one (1) year has been granted. The approval expiration date has been extended to 10/28/2024.</p> <p>STATUS: Comments on the final development plan submittal will be reviewed at the May 8, 2024, meeting of the DRC.</p>					
PROJECT NAME:					
DP-05-24-019117	05/03/2024	4E INNOVATION DRIVE	Development Plan	Active	Dan Frazier
Applicant: Ryan Lyle		Owner: PARCEL 6 LLC %TOM ZINN			
PLAN DESCRIPTION: Bluffton Community Hospital					
PROJECT NAME:					



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Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Development Plan

DP-12-23-018802 12/27/2023 21 MAIDEN LANE Development Plan Active Dan Frazier

Applicant: Sturre Design & Development, LLC

Owner:

PLAN DESCRIPTION: A request by Nathan Sturre of Sturre Engineering on behalf of the property owner Hinton Vacation Properties, LLC, for approval of a preliminary development plan application. The project proposes the development of a thirteen (13) lot mixed-use subdivision containing eleven (11) single-family residential lots, two (2) mixed-use lots, common open space, and associated infrastructure. The properties are zoned Neighborhood General – Historic District (NG-HD) and consist of 3.58 acres identified by tax map numbers R610 039 00A 0042 0000 and R610 039 00A 042A 0000 located on the south side of May River Road west of Pritchard Street.
STATUS: Comments on the preliminary development plan were reviewed at the January 31, 2024, meeting of the DRC.
STATUS: The preliminary development plan was re-submitted on February 26, 2024. STATUS 02/28/24: The Applicant requested to withdraw the application as submitted and may provide a re-submittal in the future.
STATUS: Comments on the preliminary development plan resubmittal will be reviewed at the May 1, 2024, meeting of the DRC.

PROJECT NAME: OLD TOWN

DP-04-22-016574 04/07/2022 58 CALHOUN ST Development Plan Active Dan Frazier

Applicant: Ward Edwards, Inc. - USE THIS ACCOUNT

Owner: May River Montessori

PLAN DESCRIPTION: A request by Conor Blaney of Ward Edwards Engineering, on behalf of May River Montessori, Inc., for approval of a preliminary development plan. The project consists of the construction of a new classroom building adjacent to the existing May River Montessori facility. The property is zoned Neighborhood Center Historic District (NCE-HD) and consists of approximately 0.65 acres identified by tax map number R610 039 00A 0123 0000 located at 58 Calhoun Street.
STATUS: Development plan comments were reviewed at the 5/11/22 meeting of the DRC.
STATUS: At the June 22, 2022, Planning Commission meeting, the applicant requested "withdrawal of the application to provide additional information".
STATUS: The Applicant resubmitted on July 28, 2022.
STATUS: The preliminary development plan was approved with conditions at the September 28, 2022, Planning Commission meeting.
STATUS: Staff comments on the final development plan were heard at the February 1, 2023 meeting of the DRC. Awaiting resubmittal.
STATUS: Project is still active as of July 5, 2023. The applicant would like to obtain the Town's site development permit once the state land disturbance permit is obtained.

PROJECT NAME: OLD TOWN



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Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Development Plan

DP-08-22-017076	08/15/2022	2411 OKATIE HWY HIGHWAY	Development Plan	Active	Dan Frazier
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Applicant: Dan Keefer **Owner:** Charlie and Brown

PLAN DESCRIPTION: A request by Dan Keefer of Witmer Jones Keefer, Ltd, on behalf of the property owner, Charlie and Brown, LLC for approval of a preliminary development plan. The project consists of the construction of a +/-20,000 sq. ft. two-story Clubhouse and 5 buildings divided into +/- 31 high-end garage condominium units. The property is zoned Village at Verdier PUD and consists of approximately 5.00 acres, identified by tax map number R610-021-000-0808-0000 and located on Highway 170 approximately 1,200 feet south of Seagrass Station Road.

STATUS 9-14-22: Staff courtesy review comments were reviewed at the September 21 meeting of the DRC.

STATUS: Staff comments were reviewed at the June 21, 2023 meeting of the DRC.

STATUS: The application was approved at the July 26, 2023, Planning Commission Meeting.

STATUS: The Final Development Plan was heard at the December 20, 2023 DRC Meeting. Project received NPDES Permit on January 31, 2024. Awaiting resubmittal.

PROJECT NAME:

DP-09-22-017188	09/13/2022		Development Plan	Active	Dan Frazier
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Applicant: Witmer Jones Keefer Ltd. **Owner:**

PLAN DESCRIPTION: A request by Carey Levow of Crowne at Buck Island, Limited Partnership on behalf of the property owner, Buck Island Partners, LLC for approval of a preliminary development plan application. The project consists of an apartment complex containing 4 proposed 4 story multi-family buildings and associated open space, amenities, parking, and stormwater management. The property is zoned Light Industrial and consists of approximately 10.11 acres identified by tax map number R610 039 000 0180 0000 located at 412 Buck Island Road.

STATUS: Staff comments on the preliminary development plan were reviewed at the October 19, 2022 meeting of the DRC.

STATUS: The Applicant resubmitted on November 14, 2022.

STATUS: The Preliminary Development Plan was approved at the December 14, 2022, Planning Commission. Awaiting Final Development Plan submittal,

PROJECT NAME: BUCK ISLAND/SIMMONSVILLE



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Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Development Plan

DP-03-24-019066 03/26/2024 9 BRUIN ROAD Development Plan Active Dan Frazier

Applicant: Witmer Jones Keefer Ltd.

Owner: Eugene Marks

PLAN DESCRIPTION: A request by Jonathan Marsh of Witmer Jones Keefer, Ltd, on behalf of the property owner, Eugene Marks of JOHA LLC, for approval of a preliminary development plan. The project proposes the installation of site infrastructure including internal drive, access, parking, walks, utilities, drainage, and stormwater infrastructure to support one existing residential unit and the future development of three mixed-use commercial lots and two mixed-use carriage houses for a combined total square footage of +/- 19,100 SF. The property is zoned Neighborhood Commercial – Historic District (NC-HD) and consists of approximately 0.79 acres identified by tax map number R610 039 00A 0021 0000 located at the northeast corner of Bluffton Road and Bruin Road.

Status: Staff comments on the preliminary development plan was heard at the May 1, 2024, meeting of the DRC. Awaiting resubmittal.

PROJECT NAME: OLD TOWN

DP-03-24-019021 03/01/2024 700 BUCKWALTER TOWNE BOULEVARD Development Plan Active Dan Frazier

Applicant: Cranston, LLC

Owner: TKC CCCLC, LLC

PLAN DESCRIPTION: A request by Cranston, LLC on behalf of TKC CCCLV, LLC for approval of a preliminary development plan application. The project consists of a three-story, 54,000 square foot medical office building with associated parking and infrastructure. The property is identified by tax map number R610 030 000 1854 0000 and consists of 4.76 acres located at 700 Buckwalter Towne Boulevard in the Buckwalter PUD.

STATUS: This item was heard at the 4/3/24, meeting of the DRC.

STATUS: The preliminary development plan was resubmitted on 4/24/24.

STATUS: The Preliminary Development Plan will be heard at the 5/22/24 Planning Commission Meeting.

PROJECT NAME:



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Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					

Development Plan

DP-04-24-019111 04/30/2024 9220 EVAN WAY Development Plan Active Dan Frazier

Applicant: Breck Delaney **Owner:** CVS 75651 SC LLC

PLAN DESCRIPTION: A request by Shelbi D'Avignon on behalf of the property owner CVS75651 SC LLC for review of a preliminary development plan. The project consists of an 11,286 SF retail, clinic and pharmacy with drive through, and associated infrastructure. The property is zoned Jones Estate Planned Unit Development and consists of approximately 1.911 acres identified by tax map number R610 036 000 0979 0000 located within the May River Crossing Master Plan.

Status: The preliminary development plan will be reviewed at the June 5, 2024 DRC meeting.

PROJECT NAME:

DP-09-22-017236 09/28/2022 315 GIBBET ROAD Development Plan Active Dan Frazier

Applicant: Amsdell Companies **Owner:** MFF Enterprises

PLAN DESCRIPTION: A request by Jonathan Steele of Compass TPC, LLC, on behalf of the property owner, Marilyn Faulkner of MFF Enterprises, LLC, for approval of a preliminary development plan application. The project consists of two 2-story climate-controlled storage buildings totaling 113,544 square feet including a retail sales/rental office and incidental truck rentals. The property is zoned Jones Estate PUD and consists of approximately 3.21 acres identified by tax map numbers R610-036-000-0458-0000 and R610-036-000-0459-0000 and located at the intersection of Gibbet Road and Highway 170 within the Palmetto Point Commercial Master Plan.

STATUS: Staff comments were reviewed at the November 2, 2022, meeting of the DRC.

STATUS: Preliminary development plans were resubmitted and staff comments were heard at the January 11, 2023 meeting of the DRC.

STATUS: The preliminary development plan was approved at the February 22, 2023, Planning Commission meeting.

STATUS: Staff comments on the final development plan application was heard at the May 15, 2024, meeting of the DRC.

PROJECT NAME: PALMETTO POINTE COMMERCIAL



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Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Development Plan

DP-11-22-017433 11/28/2022 8241 PINELLAS DRIVE Development Plan Active Dan Frazier

Applicant: Moore Civil Consultants, Inc.

Owner:

PLAN DESCRIPTION: A request by Jared Thompson of Moore Civil Consulting, Inc., on behalf of the property owner Ken Toskey for approval of a preliminary development plan. The project consists of the construction of three office buildings totaling 12,600 S.F., associated driveways, parking areas, and bioretention areas. The property is zoned Buckwalter Planned Unit Development and consists of approximately 1.5 acres identified by tax map numbers R610 022 000 1143 0000 located within the Buckwalter Commons Phase 1 Master Plan.

STATUS: Staff comments on the preliminary development plan were reviewed at the January 4, 2023 meeting of the DRC.

STATUS: The preliminary development plan was approved at the February 22, 2023, Planning Commission meeting. An incomplete final development plan application was submitted on January 18, 2024. As of 2/26/24, landscape plans are being prepared for Final development plan submittal.

PROJECT NAME: PARCEL C2-E BUCKWALTER PLAZA

DP-10-23-018564 10/12/2023 Development Plan Active Dan Frazier

Applicant: Ward Edwards, Inc. - USE THIS ACCOUNT

Owner:

PLAN DESCRIPTION: A request by Willy Powell of Ward Edwards, Inc., on behalf of the property owner Okatie Bluffs Owner LLC/Adrien Dannemiller for approval of a preliminary development plan. The project consists of the construction of six multifamily buildings, four garage buildings, a clubhouse, amenities, and associated infrastructure. The property is zoned Buckwalter Planned Unit Development and consists of approximately 22.0 acres identified by tax map number R610 028 000 0921 0000 located within the Parcel B-1 Master Plan.

STATUS: Comments on the preliminary development plan application were reviewed at the November 15, 2023, meeting of the DRC.

STATUS: The preliminary development plan was resubmitted on 11/22/23.

STATUS: The Preliminary Development Plan was approved at the 12/20/23 Planning Commission Meeting. Awaiting final development plan submittal.

PROJECT NAME:



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Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Development Plan

DP-06-22-016804 06/01/2022 6201 JENNIFER CT Development Plan Active Dan Frazier

Applicant: Witmer-Jones-Keefer, Ltd.

Owner: Michael Bradley Holdings, LLC

PLAN DESCRIPTION: A request by Witmer Jones Keefer, Ltd for approval of a preliminary development plan application. The project proposes the construction of a ±50,000 SF two-story building that includes a +/-20,000 square foot production brewery, and a +/-30,000 square foot space allocated to restaurant tenants, retail tenants, business offices, and a tasting room. The property is zoned Neighborhood Core (NC), identified by tax map numbers R610 039 000 0021 0000, R610 039 000 0756 0000, and R610 039 000 0757 0000 and located on three existing lots on Jennifer Court at the intersection of Buck Island Road and May River Road.

STATUS UPDATE: Staff comments were heard at the July 6 meeting of the DRC.

STATUS UPDATE: The application was approved with conditions at the August 24, 2022, Planning Commission meeting.

STATUS UPDATE: Staff comments on the final development plan were heard at the November 30, 2022 meeting of the DRC.

STATUS UPDATE: Final development plans were resubmitted on December 7, 2023.

STATUS UPDATE: Staff provided the applicant with comments on the final development plan re-submittal on December 22, 2023.

PROJECT NAME: BUCK ISLAND/SIMMONSVILLE

DP-03-24-019067 03/26/2024 2800 MAY RIVER CROSSING Development Plan Active Dan Frazier

Applicant: Ryan Lyle

Owner: First Chatham Bank

PLAN DESCRIPTION: A request by Ryan Lyle of Davis & Floyd, Inc on behalf of Russell Baxley of Beaufort Memorial Hospital for approval of a preliminary development plan. The project consists of the construction of a 5,000 SF medical office building with associated parking and pedestrian access. The property is zoned Jones Estate Planned Unit Development and consists of approximately 1.37 acres identified by tax map number R610 036 000 3212 0000 and located within the May River Crossing Master Plan.

Status: Staff comments on the preliminary development plan were heard at the May 1, 2024, meeting of the DRC.

PROJECT NAME: May River Crossing



Growth Management Application Update Report

Attach

Section X. Item #1.

Town of Bluffton
Department of Growth Management
Office of Planning and Community Development
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Development Plan

DP-08-23-018338 08/01/2023 1 JCS COVE Development Plan Active Dan Frazier

Applicant: Sturre Design & Development, LLC **Owner:** James Saba

PLAN DESCRIPTION: A request by Nathan Sturre of Sturre Engineering on behalf of the property owner James Saba, for approval of a preliminary development plan application. The project proposes the construction of a 2,786 SF recreation building to serve the six (6) single family residences at JC's Cove. The property is zoned Agriculture (AG) and consists of 1.53 acres identified by tax map number R610 039 000 1129 0000 located on the south side of May River Road approximately 1,200 feet east of Buck Island Road.
STATUS: Staff comments on the preliminary development plan was reviewed at the September 6, 2023 meeting of the DRC.
STATUS: The preliminary development plan was heard at the September 27, 2023, Planning Commission meeting. Conceptual COFA was heard at the 2/21/24 DRC meeting. Awaiting final development plan submittal.

PROJECT NAME: JC'S COVE

Public Project

DP-04-24-019083 04/09/2024 340 PARKSIDE COMMONS Development Plan Active Dan Frazier

Applicant: Town of Bluffton **Owner:** Town of Bluffton

PLAN DESCRIPTION: A request by Constance Clarkson on behalf of the Town of Bluffton for approval of a public project. The project consists of the installation of trellis swings, trash cans, dog stations and decorative pathway lighting in New Riverside Village Park. The properties are zoned New Riverside Planned Unit Development and consists of approximately 5.29 acres identified by tax map numbers R610 036 000 3703 0000 and R610 036 000 3214 0000 and located within the New Riverside Village Master Plan.

PROJECT NAME:

DP-04-24-019078 04/08/2024 101 PROGRESSIVE ST STREET Development Plan Active Dan Frazier

Applicant: Town of Bluffton **Owner:** Town of Bluffton

PLAN DESCRIPTION: A request by Mark Maxwell on behalf of the Town of Bluffton for approval of a public project. The public private partnership consists of the construction of three commercial buildings totaling approximately 50,000 square feet of class A office and light industrial warehouse space, with supporting infrastructure. The properties are zoned Buckwalter Planned Unit Development and consists of approximately 5.2 acres identified by tax map numbers R610 030 000 1848 0000, R610 022 000 1103 0000 and R610 030 000 1649 0000, and located within the Buckwalter Place Master Plan.

PROJECT NAME:



Growth Management Application Update Report

Attach

Section X. Item #1.

Town of Bluffton

Department of Growth Management

Office of Planning and Community Development

20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Development Plan

DP-12-23-018739 12/05/2023 3829 OKATIE HWY HIGHWAY Development Plan Active Dan Frazier

Applicant: Town of Bluffton

Owner: Town of Bluffton

PLAN DESCRIPTION: A request by Constance Clarkson on behalf of the Town of Bluffton for approval of a public project. The project consists of surface improvements to the New River Linear Trail, construction of a pier at the southern trail terminus and restroom facilities at the trailhead parking lot. The properties are zoned Jones Estate Planned Unit Development and New Riverside Planned Unit Development and consists of approximately 42.7 acres identified by tax map numbers R610 028 000 0018 0000, R610 035 000 0016 0000 and R614 035 000 0011 0000, and located within the Cypress Ridge Master Plan and Heritage at New Riverside Master Plan.
STATUS: Comments for the public project were reviewed at the January 3, 2024, meeting of the DRC. Awaiting resubmittal.
STATUS 03/15/24: The project manager is negotiating an easement agreement with Central Electric and Santee Cooper.

PROJECT NAME:

DP-10-23-018587 10/19/2023 800 BUCKWALTER PARKWAY Development Plan Active Dan Frazier

Applicant: Wood and Partners, Inc.

Owner: Town of Bluffton

PLAN DESCRIPTION: A request by Eric Walsnovich of Wood + Partners, Inc, on behalf of the property owner, Town of Bluffton, for approval of a public project. The project proposes the construction of four new soccer fields; a new restroom building; renovations to the existing restroom building; new parking areas, driveways and sidewalks; storm water management facilities; associated utilities; lighting; site furnishings and landscaping. The property is zoned Buckwalter Planned Unit Development and consists of approximately 142.9 acres identified by tax map number R610 038 000 0053 0000 located within the Buckwalter Recreation Center Master Plan.
Status: Comments on the public project were reviewed at the November 15, 2023, meeting of the DRC.
Status 4/15/24: The applicant has submitted for Stormwater Permit and it is currently under review.

PROJECT NAME:

Total Development Plan Cases: 29

Development Plan Amendment

NA



Growth Management Application Update Report

Town of Bluffton
Department of Growth Management
Office of Planning and Community Development
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment Section X. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Development Plan Amendment

DPA-09-22-017226 09/23/2022 Development Plan Amendment Active Dan Frazier

Applicant: Tabby Road HOA **Owner:** Tabby Road HOA

PLAN DESCRIPTION: A request by Tabby Roads HOA for approval of a development plan amendment application. The project consists of closing the Tabby Shell Road entrance from Burnt Church Road. The property is identified by tax map number R610 039 000 1235 0000 and is zoned Neighborhood General -HD.

Status: This item is on the October 26, 2022 DRC Meeting agenda.

Status 11-29-22: Revisions are required. Waiting on revisions to be submitted.

Status 1-9-23: Plans have been conditionally approved by the Town of Bluffton. The Town requires approval from SCDOT and BJWSA for the road closing prior to issuing Final Approval. SCDOT has issued their encroachment permit. Waiting on BJWSA approval.

PROJECT NAME: TABBY ROADS PHASE 1

Total Development Plan Amendment Cases: 1

Master Plan

NA



Growth Management Application Update Report

Town of Bluffton
Department of Growth Management
Office of Planning and Community Development
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment Section X. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Master Plan

MP-04-22-016566	04/06/2022		Master Plan	Active	Dan Frazier
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Applicant: Village Park Communities, LLC **Owner:** Village Park Communities, LLC

PLAN DESCRIPTION: A request by Dan Keefer of Witmer Jones Keefer, LTD, on behalf of Village Park Communities, LLC, for approval of Alston Park Phase 3 Master Plan. The project consists of a maximum of 76 dwelling units, park/open spaces and related infrastructure. The subject property, comprised of 2 parcels totaling approximately 63 acres, is identified by Beaufort County Tax Map numbers R610 035 000 0019 0000 and R610 035 000 0846 0000 and commonly referred to as New Riverside Parcel 5A South located within the New Riverside PUD.

STATUS: Initial Master Plan comments were reviewed at the 5/11/22 meeting of the DRC.

STATUS: The Initial Master Plan request received a recommendation of approval at the February 22, 2023, Planning Commission meeting.

STATUS 04/01/24: The Holly Hill Lane Plat is being recorded. A community meeting is tentatively scheduled for May 1, 2024. The application will advance to Town Council once the plat is recorded and the community meeting has been held.

STATUS 4/15/24: A community meeting is tentatively scheduled for May 14, 2024.

PROJECT NAME: ALSTON PARK

Total Master Plan Cases: 1

Subdivision Plan

General



Growth Management Application Update Report

Attachment

Section X. Item #1.

Town of Bluffton
Department of Growth Management
Office of Planning and Community Development
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Subdivision Plan					
SUB-04-23-017885	04/10/2023		Subdivision Plan	Active	Dan Frazier
Applicant: Ward Edwards, Inc. - USE THIS ACCOUNT		Owner: Indigo Cove LLC			
<p>PLAN DESCRIPTION: A request by Ward Edwards Engineering on behalf of Indigo Cove LLC for approval of a subdivision application. The project consists of creating 82 single family residential attached townhomes including an amenity center, access drives, parking, landscaping, open space areas, and associated infrastructure. The property is identified by tax map number R610 031 000 0002 0000 and consists of 12.7 acres located at the northeast corner of Buck Island Road and Bluffton Parkway. The property is zoned Residential General.</p> <p>Status: This item is on the July 19, 2023 DRC Meeting agenda.</p> <p>Status: This item was conditionally approved at the July 19, 2023 DRC Meeting. However, the status will remain active until a surety is provided for the development.</p>					
PROJECT NAME:					
SUB-03-24-019040	03/11/2024		Subdivision Plan	Active	Dan Frazier
Applicant: Thomas and Hutton		Owner: K Hovnanian Four Seasons			
<p>PLAN DESCRIPTION: A request by Thomas & Hutton on behalf of K. Hovnanian Homes for approval of a subdivision application. The project consists of creating 67 single-family lots along with associated right-of-way and common areas within Four Seasons at Carolina Oaks. The property is identified by tax map number R614 028 000 0002 0000 and consists of 34.5 acres. The property is zoned Jones Estate PUD.</p> <p>Status: This item is on the 4-17-24 DRC Meeting agenda.</p>					
PROJECT NAME: Four Seasons at Carolina Oaks					
SUB-12-23-018796	12/20/2023	50 GUERRARD AVE AVENUE	Subdivision Plan	Active	Dan Frazier
Applicant: Patrick Mason Custom Homes		Owner: RDB Land Development			
<p>PLAN DESCRIPTION: A request by Patrick Mason on behalf of RDB Land Development, LLC for approval of a subdivision application. The project consists of creating three lots from the existing single lot. The property is identified by tax map number R610 039 00A 0199 0000 and consists of .74 acres located at 50 Guerrard Avenue. The property is zoned Neighborhood General - HD.</p> <p>This item is on the January 31, 2024 DRC Meeting agenda.</p>					
PROJECT NAME: OLD TOWN					



Growth Management Application Update Report

Town of Bluffton
Department of Growth Management
Office of Planning and Community Development
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment Section X. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Subdivision Plan

SUB-04-24-019095	04/19/2024		Subdivision Plan	Active	Dan Frazier
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Applicant: Thomas & Hutton

Owner: Lamar Smith Signature Homes, LLC

PLAN DESCRIPTION: A request by Tyler Vaughn of Thomas & Hutton on behalf of K. Hovnanian Homes for approval of a subdivision application. The project consists of creating 48 single-family residential lots and associated infrastructure. The property is identified by tax map numbers R614 035 000 1362 0000 and R614 035 000 1318 0000 and consists of 15.5 acres. The development is located along Founders Walk, and Preamble Drive. The property is zoned Jones Estate PUD.

Status: This item is on the May 22, 2024 DRC Meeting agenda.

PROJECT NAME: HERITAGE AT NEW RIVERSIDE PHASE 8 & 9

Total Subdivision Plan Cases: 4

Zoning Action

UDO Text Amendment



Growth Management Application Update Report

Town of Bluffton
Department of Growth Management
Office of Planning and Community Development
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment Section X. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					

Zoning Action

ZONE-03-18-011836 03/26/2018 Zoning Action Active Kevin Icard

Applicant: Town of Bluffton **Owner:** Town of Bluffton

PLAN DESCRIPTION: A request by the Unified Development Ordinance Administrator for consideration of revisions to the following sections of the Town of Bluffton's Municipal Code of Ordinances, Chapter 23, Unified Development Ordinance:

1.1.8 Activities That Do Not Constitute Development; 2.2 Establishment; 3.2 General Application Approval Process; 3.9 PUD Master Plan; 3.18 Certificate of Appropriateness – Historic District (HD); 3.19 Site Feature – Historic District (HD); 3.20.2 Applicability; 3.25 Designation of Contributing Structure; 3.26 Appeals; 4.4 Conditional Use Standards; 5.3.7 Specific Landscaping Standards; 5.15 Old Town Bluffton Historic District; 7.2.2. Illegal Nonconformities; 7.9 Nonconforming Sites Resulting from Right-Of-Way Dedication or Acquisition; 9.2 Definitions; 9.3 Interpretation of Dimensional Standards; and, 9.4 Description of Uses of Land and Buildings

STATUS: 1/29/2019 The Application was heard at the January 23, 2019 Planning Commission meeting where it was recommended for approval to Town Council with conditions related specifically to Public Projects, Minor and Major PUD Master Plans, Development Plans, requiring public notice for various projects and to include language related to appeals.

STATUS: 2/18/2019 The Application will be heard at the March 12th Town Council meeting.

STATUS: 5/28/2019 A portion of the text amendments were approved by Town Council at their March 12, meeting. Additional items will be presented to Town Council at a future date.

STATUS: 4/21/2020 Various UDO text amendments are being reviewed by Planning Commission, and Town Council over the coming months.

STATUS: 4/22/2024 - Staff continues to bring forth UDO edits to be reviewed by Planning Commission, and Town Council.

PROJECT NAME:

Zoning Map Amendment



Growth Management Application Update Report

Town of Bluffton

Department of Growth Management

Office of Planning and Community Development

20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section X. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Zoning Action

ZONE-02-24-018921	02/02/2024	11 GRASSEY LANE	Zoning Action	Active	Dan Frazier
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Applicant: Sturre Design & Development, LLC

Owner:

PLAN DESCRIPTION: A request by Nathan Sturre of Sturre Engineering on behalf of the property owners Cornerstone Church of Bluffton and Lalie Ann Mole, for approval of a zoning map amendment. The applicant is requesting to rezone two parcels from the Planned Unit Development (PUD) zone district to a mix of Agricultural (AG) and Rural Mixed Use (RMU) zoning districts. The properties are zoned Mindstream Academy Planned Unit Development and consists of approximately 43.3 acres identified by tax map numbers R610 036 000 0014 0000 and R610 036 000 014B 0000 located south of May River Road approximately 600 feet east of Stardust Lane.

STATUS: A required Planning Commission Workshop was held on February 28, 2024. STATUS 03/27/24: The Planning Commission recommended approval of the request at the March 27, 2024, Planning Commission Meeting.

STATUS: First reading of the Zoning Map Amendment was approved at the April 9, 2024, meeting of Town Council.

STATUS: Public Hearing and Second & Final Reading of the Zoning Map Amendment request will heard at the May 14, 2024, meeting of Town Council.

PROJECT NAME:

ZONE-01-24-018840	01/11/2024		Zoning Action	Active	Dan Frazier
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Applicant: University Investments

Owner: University Investments

PLAN DESCRIPTION: A request by University Investments, LLC, for a Zoning Map Amendment for approximately 65.592 acres located at the northwest corner of the intersection of Buckwalter Parkway and Lake Point Drive and identified by Beaufort County Tax Map Nos. R600 029 000 2410 0000 and R600 029 000 0014 0000 to rezone the subject property to Buckwalter Planned Unit Development (PUD) subject to a new Grande Oaks Commons Land Use Tract to be established through a Buckwalter PUD Text Amendment. This application is associated with the following requests; ANN-11-23-018624, CPA-01-24-018845, COMP-01-24-018844, ZONE-02-24-018991 (Text), and DAA-01-24-018842.

STATUS: Comments on the associated Concept Plan Amendment were heard at the March 27, 2024 meeting of the DRC.

STATUS: This request will be heard at the May 22, 2024, Planning Commission Meeting as a Public Workshop item.

PROJECT NAME:



Growth Management Application Update Report

Town of Bluffton
Department of Growth Management
Office of Planning and Community Development
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section X. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
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Active Cases

Zoning Action

ZONE-03-24-019046 03/14/2024 Zoning Action Active Dan Frazier

Applicant: Bryant and Son Trucking Company **Owner:** Bryant and Son Trucking Company

PLAN DESCRIPTION: A request by the applicant and property owner Johnnie Bryant III, for approval of a zoning map amendment application. The property is located at 30 Davis Road and consists of approximately 2.14 acres identified by tax map number R600 029 000 0028 0000 and currently zoned T2R Rural in unincorporated Beaufort County. This application is associated with the following annexation request; ANNEX-03-24-019045.

STATUS: This request will be heard at the May 22, 2024, Planning Commission Meeting as a Public Workshop item.

PROJECT NAME:

Total Zoning Action Cases: 4

Total Active Cases: 65

Total Plan Cases: 65



Town of Bluffton
 20 Bridge St.
 PO Box 386
 Bluffton, SC 29910
 843.706.4500

To: Town Council
From: Stephen Steese, Town Manager
Date: June 3, 2024

Town Operations / Community Meetings

- The Town Budget Workshops were held in May. Public Notice has been posted for the Public Hearing that will be held during the June Council Meeting. The only change in the Proposed Budget since First Reading has been to include a \$144,000 grant from the Regional Housing Trust.
- The Town's Annual May River Cleanup occurred May 4th from 9:00 – 11:00 am with over 250 people participating. Thank you to Mayor and Council for attending, Watershed for coordination, Kevin and the Police Department for preparing lunch for participants.
- We are finalizing the repair schedule and cost for the shelter at Dubois. We hoped to get it back open as soon as possible. We are also beginning an update of our tree survey to identify any additional trees that may be at risk.
- The Town held out Hurricane Preparation Meetings as Hurricane Season starts June 1st.

Town Council/Town Attorney Related Meetings

- Weekly Mayor / Mayor Pro Tempore / Manager meetings.
- Mayor Toomer, Councilpersons Hamilton, Wood and Burden, and staff attended the SOLOCO Meeting at the Rotary Center. We received updates from Novant Health, former Tenet Health, about their transition and operational plans. We will hear from groups about childcare needs in the region in June.
- Mayor Toomer, Police Chief, and I had our bi-monthly coffee meeting on May 14th. We discussed some concerns he heard from citizens related to traffic enforcement, and preparations for Memorial Day.
- Mayor and Council held a groundbreaking ceremony for the New Riverside Trail improvements. The restrooms are being completed in June and paving of the southern half of the trail will go to bid soon.
- Mayor and Council held a groundbreaking ceremony for our Affordable Housing development at 1095 May River Road. Workforce State of Mind is finalizing their work start and will be working to complete the property transfer.
- Mayor, Council, and staff participated in a Mobile Town Home at The Haven. The event went well and the community was appreciative of the information.
- Mayor Toomer presented Mayor Service Awards for about 70 students and also awarded 4 Stay Safe Bluffton Scholarships to Seniors.

Updates and Miscellaneous Information

- The first Lean Process analysis of our process for our permitting a commercial construction project was held May 20 - 24. The team did a great job and provided some ideas on how we can work to reduce the processing time and make it more efficient for applicants and our staff. We will have follow-up meetings schedule implementation steps.
- Our summer interns are starting the week of June 3rd.
- We are waiting on the drawing for the MASC Annual Conference to find out where we will fall in the registration order.

TOWN COUNCIL

STAFF REPORT
Human Resources



MEETING DATE:	June 11, 2024
PROJECT:	Addendum to Employer Resolution for Participation in the State Insurance Benefits Program
PROJECT MANAGER:	Anni Evans, Human Resources Director

REQUEST: Consideration by Town council to approve the Addendum to Employer Resolution for Participation in the State Insurance Benefits Program regarding Municipality Councilmember coverage.

BACKGROUND: On March 6, 2024, the PEBA Board of Directors voted unanimously to amend the definition of “Employee” for the purposes of eligibility to participate in the state insurance benefits program. This amendment allows councils of participating counties and municipalities to exercise a one-time irrevocable option to exclude their councilmembers from the definition of “Employee.”

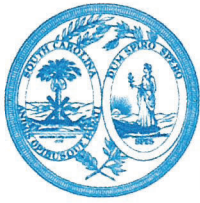
Councils of currently participating counties and municipalities must submit an addendum to their participation resolution to PEBA no later than July 1, 2024, indicating whether their councilmembers will remain eligible Employees in the state insurance benefits program or if they will be excluded.

NEXT STEPS: Upon approval council must sign the Addendum to Employer Resolution for Participation in the State Insurance Benefits Program form provided by PEBA. The Town will submit the approved form to PEBA by July 1, 2024, agreeing to include Councilmembers as Employees for participation in the State Insurance Benefits Program.

SUMMARY: This action is being taken as directed by PEBA because of their amendment to the definition of “Employee” in March 2024.

ATTACHMENTS:

1. Addendum to Employer Resolution for Participation in the State Insurance Benefits Program regarding County/Municipality Councilmember Coverage form.
2. Resolution



Addendum to Employer Resolution for Participation in the State Insurance Benefits Program regarding County/Municipality Councilmember Coverage

Complete the form below and submit via mail or email to:

S.C. PEBA
Attn: Insurance Employer Audit
202 Arbor Lake Drive
Columbia, SC 29223

EmployerAudits@peba.sc.gov

As an addendum to the resolution entered into by the _____ (Employer) for
County/Municipality Name

Participation in the State Insurance Benefits Program, the _____ Council of
County/Town/City

_____ (Council) hereby makes the following election regarding the eligibility of
County/Municipality Name

elected members of the Council to participate as active employees in the State Insurance Benefits Program (Program) offered by the South Carolina Public Employee Benefit Authority (PEBA) pursuant to Section 1-11-703 et seq. of the 1976 Code of Laws:

Select one only.

- ☐ Members of the Council will be considered Active Employees of the Employer for the purposes of participation in the State Insurance Benefits Program (*only available if Councilmembers are paid and are eligible for participation in the South Carolina Retirement Systems*); or
- ☐ Members of the Council will **not** be considered Active Employees of the Employer for the purposes of participation in the State Insurance Benefits Program.

In making this election, the Council hereby understands, acknowledges and agrees that:

1. The election made above is a material requirement for participation in the Program established by the PEBA Board of Directors and is irrevocable during the Employer's period of participation in the Program;
2. The election made above applies only to Councilmembers' participation in the Program, and does not affect Councilmembers' participation in the South Carolina Retirement Systems;
3. If the Council has elected to decline coverage, Councilmembers will not be considered Employees of the Employer, as that term is defined in the State Health Plan, for purposes of eligibility and participation in the Program, and will not be eligible for any benefit offered under the Program as an Active Employee by virtue of membership on the Council; service on the Council will not be taken into consideration for eligibility for retiree insurance coverage under

the Program; and the Council and Employer irrevocably waive and disclaim any rights the Employer or its Councilmembers may have regarding Councilmembers' benefits from the Program as a result of their service on the Council after the date of this election; and

4. The election made above will not be effective until it is received in good order and approved by PEBA, and nothing in this election alters any other obligations Employer has to properly and timely administer insurance benefits under the Program for other Employees of the Employer in accordance with the requirements established by PEBA.

IN WITNESS WHEREOF, we have hereunto set our hands and authority at the meeting of the

_____ Council of the _____
County/Town/City County/Municipality Name
County of _____, South Carolina, held at _____
County Location
this _____ day of _____, 20_____.
Day Month

Signatures of Council Members

A majority must sign.

_____	_____
_____	_____
_____	_____
_____	_____

Certification

I _____, _____ of the aforesaid Employer, hereby certify
Name Title
that the aforesaid Council consists of _____ duly elected members, and that as stated above,
Number
_____ members voted in favor of the above Addendum.
Number

IN WITNESS WHEREOF, I have hereunto set my hand and the authority of the aforesaid Employer.

_____	_____	_____
Signature	Date	Employer Group Number

TOWN COUNCIL

STAFF REPORT
Executive Department



MEETING DATE:	June 11, 2024
PROJECT:	Consideration to Approve a Resolution for Execution of Two IGAs with Beaufort County School District for School Resource Officers and Crossing Guards
PROJECT MANAGER:	Felicia Roth, Director of Compliance and Contracts

REQUEST: Town Staff requests Town Council to authorize the Town Manager to execute two Intergovernmental Agreements for School Resource Officers and Crossing Guards with Beaufort County School District.

BACKGROUND: The Town currently has Intergovernmental Agreements (IGAs) with the Beaufort County School District (the District) which run from July 1 through June 30 each year. Agreements for FY25 will fund five (5) School Resource Officers (SROs) and seven (7) crossing guards to be paid for by the District. Please note that the IGA for the SROs is separate from the seven (7) additional SROs funded by State grant through the South Carolina Department of Public Safety.

NEXT STEPS: Approve Resolution to sign IGAs.

SUMMARY: Contract value of the IGA for SROs is \$400,017 (District reimburses 75% of the \$533,356 annual cost which includes salary, fringe, and any potential new vehicle and equipment); contract value of the crossing guards is \$151,256 which is reimbursed at 100% by the District.

ATTACHMENTS:

1. Intergovernmental Agreement 2025-02, School Crossing Guard FY25
2. Intergovernmental Agreement 2025-01, SRO FY25
3. Resolution
4. Recommended Motion

STATE OF SOUTH CAROLINA)
COUNTY OF BEAUFORT)

CONTRACT AGREEMENT
2025-01

THIS CONTRACT AGREEMENT ("Agreement") is effective as of the 1st day of July 2024, by and between the BEAUFORT COUNTY SCHOOL DISTRICT (the "BCSD") and the TOWN OF BLUFFTON (the "Town") and its BLUFFTON POLICE DEPARTMENT (the "Bluffton PD"), (collectively, the "Parties").

WHEREAS, the BCSD and the Town desire to set forth in this Agreement the specific terms and conditions of the Bluffton School Resource Officer ("SRO") program and the services to be performed for and provided to the BCSD by Bluffton PD; and

WHEREAS, the BCSD and the Bluffton PD recognize the benefits of the SRO program to the citizens of Beaufort County, and particularly to students, parents, and staff of the BCSD; and

WHEREAS, the BCSD desires to have the Bluffton PD provide SRO services to the schools identified below; and

WHEREAS, it is in the best interests of the BCSD, the Town, the Bluffton PD, and the citizens of Beaufort County to establish and maintain an SRO program as hereinafter described; and

WHEREAS, the Parties agree and understand the State of South Carolina implemented regulations governing SROs and the services provided to public schools by SROs; and

WHEREAS, the Parties agree all prior SRO Agreements, contracts, memoranda, and Amendments are hereby incorporated into this Agreement.

- 1. INCORPORATION OF STATE REGULATIONS.** The Parties agree to incorporate herein and to be bound by the State regulations in effect as of the date of this Agreement and as may be amended from time to time.
- 2. EXPECTATIONS FOR SROs IN BCSD SCHOOLS.** The BCSD school campuses are learning environments where BCSD students are prepared for success in college, careers, and citizenship. SROs are necessary to provide law enforcement and police services to assist in providing a safe learning environment. SROs shall act in accordance with policies and procedures of the Bluffton PD to enforce state laws and county and municipal ordinances.
- 3. SRO DEFINED.** An SRO, as defined in South Carolina Code Annotated Section 5-7-12, shall be a sworn law enforcement officer, pursuant to the requirements of any jurisdiction of South Carolina, who has completed the basic course of instruction, as provided or recognized by the National Association of School Resource Officers or the South Carolina Criminal Justice Academy, and who is assigned to a BCSD school to

have as a primary duty the responsibility to act as a law enforcement officer, advisor, and teacher in such school.

4. An SRO who is a Class I Police Officer has statewide jurisdiction to arrest any persons committing crimes in connection with a school activity or school-sponsored event. An SRO who is a Class III Police Officer has jurisdiction to arrest any persons committing crimes in connection with school activity or school-sponsored events on campus only.

5. **RIGHTS AND DUTIES OF THE BLUFFTON PD.**

A. Number and Assignment of School Resource Officers.

1. The Bluffton PD shall assign no fewer than one (1) regularly employed, fully trained, and fully equipped school resource officer to:
 - a. Bluffton High School
 - b. Bluffton Middle School
 - c. H. E. McCracken Middle School
 - d. May River High School
 - f. River Ridge Academy
2. The Bluffton PD shall assign a supervisor during the BCSD regular school year for students to oversee the law enforcement officer(s) assigned to the school and to perform scheduled and non-scheduled visits to the school.
3. The Bluffton PD shall provide mid-year and year-end reports of calls for services and criminal incidents occurring on BCSD property to the Superintendent, or his/her designee. The reports shall include trend data with a narrative explanation.
4. The Bluffton PD shall be responsible for making salary and fringe benefits payments of an assigned SRO in accordance with Bluffton salary schedules and employment practices.
5. The Bluffton PD shall provide Worker's Compensation for the SRO when assigned and on extra-duty assignments in the BCSD.

B. Regular Duty Hours of School Resource Officers.

1. The schools listed in Section 4.A.1. shall have no fewer than one (1) SRO assigned on a full-time basis during the regular school year, on duty for no less than eight (8) hours a day. In the event an assigned SRO shall be required to attend court or training, the Bluffton PD shall provide coverage, both the extent possible and practicable by the SRO and by the Bluffton PD. Any SRO may be temporarily reassigned by the Bluffton PD during school holidays and summer vacations or during a law enforcement emergency.

2. In cases of emergency or unusual circumstances, in the joint discretion of the Bluffton PD Chief, or his or her designated representative, and BCSD Superintendent, or his or her designated representative, an SRO may be temporarily assigned such duties at the elementary school level to insure the continued physical and psychological well-being of students. A record shall be kept of the dates of such temporary assignments and circumstances warranting. This record shall be made part of the reports required by this Paragraph 4.

C. Roles and Duties of School Resource Officers.

1. Law Enforcement Officer. As sworn law enforcement officials, SROs have a major role in campus security. SROs shall not only be called to respond to criminal incidents, but also to assist in emergency crisis planning, building security, and training school personnel on handling crisis situations. SROs shall be called immediately to handle school disturbances by persons who are not students that willfully interfere with, disrupt or disturb the normal operations of the school.
2. Law-Related Educator and Instructional Responsibilities. Teachers and staff shall utilize SROs within the classroom to help design and present law-related topics regarding the role of law enforcement in our society. Each SRO shall act as an instructor for specialized, short-term programs at all schools, when invited to do so by the Principal or a member of the faculty. Each SRO shall act in the capacity of law enforcement, teacher and counselor for Public Safety classes.
3. Community Liaison. Principals shall encourage SROs' visibility within the school community, as well as attendance and participation at school functions, to build working relationships with school personnel, students, and parents.
4. Positive Role Model. SROs shall be positive role models and may be used to promote the profession of law enforcement as a career choice for students. School administrators shall support positive interactions between SROs and students on school campuses.
5. Additional Duties and Responsibilities of SROs.
 - a. SROs shall coordinate all their activities and programs within the school with the Principal or his/her designee and shall seek and receive approval and guidance prior to enactment.
 - b. SROs shall develop expertise in presenting various subjects to students. Such subjects shall include a basic understanding of state laws, the role of the law enforcement officer, and his/her duties. A program evaluation form shall be distributed to all students and the teacher after each session by the SRO. This information shall be kept on file by each SRO or by the Bluffton PD and shall be subject to review by the BCSD and the Bluffton PD.

- c. SROs shall encourage individual and small group discussion with students based on material presented in class to further establish rapport with the students.
- d. When requested by a Principal, an SRO shall attend parent/faculty meetings to solicit support and understanding of the SRO program.
- e. SROs shall make themselves available for conferences with students, parents, and faculty members to assist them with problems of a law enforcement or crime prevention nature. Confidential information obtained during these conferences shall be governed by Title 63 of the South Carolina Code of Laws (the South Carolina's Children's Code) and shall not be disclosed except as allowed and or required by law.
- f. SROs shall become and be familiar with community agencies offering assistance to youth and their families, including but not limited to mental health clinics and drug assistance centers. SROs shall make referrals to such agencies when necessary, thereby acting as a resource person to students, parents, faculty, and staff of the School.
- g. SROs shall assist Principals in developing plans and strategies to prevent and/or minimize dangerous situations which may result from student arrests.
- h. Should it become necessary to conduct formal police interviews with the students, the SRO shall inform the Principal or his/her designee and shall adhere to law enforcement policies and procedures and legal requirements regarding such interviews.
- i. SROs shall take law enforcement action as required. SROs shall take law enforcement action as required against intruders and unwanted guests who may appear at a school and/or related school functions, to the extent SROs may do so under the authority of law. As soon as practicable, SROs shall make the appropriate Principal aware of such action.
- j. SROs shall assist other law enforcement officers in matters regarding his/her school assignment, whenever necessary. SROs shall, whenever possible, participate in and/or attend school functions as they relate to their duties.
- k. SROs shall maintain detailed and accurate records of the SRO Program on a weekly basis and shall forward the same to SRO supervisors, who shall forward copies to the Superintendent and/or his/her designee.

D. Student Discipline Functions of SROs.

1. SROs shall not act as school disciplinarians and shall not ordinarily be requested or permitted to intervene in school discipline matters. Discipline of BCSD students is a school and BCSD responsibility.
2. SROs shall be called only in situations when a student's behavior has exceeded the level of disruptive student behavior, as determined by the appropriate school administrator and as based on the BCSD administrative regulation when the student's behavior amounts to a Level III violation for which law enforcement involvement is required. SROs shall be called when conduct rises to the level of criminality or when the conduct presents an immediate safety risk to one or more persons.
3. When law enforcement referrals are required, the SRO shall be the first line of contact for local law enforcement to ensure the matter is resolved expeditiously to decrease significant interruption to the learning process.
4. SROs are not to be used for regularly assigned lunchroom duties, hall monitoring, or other monitoring duties.
5. In cases of contested expulsions, the Bluffton PD shall provide case information and/or testimony to the Superintendent and/or his/her designee, and shall, upon request of the BCSD Board of Education and/or the Superintendent, or his/her designee, appear and testify at the hearing.
6. SROs shall accompany a Principal and/or his/her designee to deliver expulsion documents to students and/or parents, should the Principal and/or his/her designee believe his/her safety may be in jeopardy when served in the Town of Bluffton.

E. General Provision for Visitors, Employees, and Unauthorized Persons. Students deserve school environments safe and conducive to learning. Visitors and employees shall not disrupt the learning environment or school activity inappropriately or unlawfully. State law mandates it is unlawful to willfully or unnecessarily interfere with or disturb school, loiter about a school, or act in an obnoxious manner while at a school. An SRO should be called immediately to handle a disturbance or emergency regarding a visitor or employee who disrupts the learning environment or school activity as defined in S.C. Code Ann. Section 16-17-420.

5. **EXTRA-DUTY ASSIGNMENTS.** Upon approval by the Bluffton PD's Chief, the BCSD and its schools shall utilize the Bluffton PD and its officers for extra-duty assignments provided Bluffton PD officers are available for extra-duty assignments. The BCSD shall pay the Bluffton PD's extra-duty assignment hourly rate as set in **Exhibit A**, attached. In the event the Town and/or Bluffton PD allow Bluffton PD officers to have extra-duty assignments with payment at the extra-duty hourly rate, the rules, procedures, and rates for extra-duty assignments of Bluffton PD officers shall be set forth in the attached.

- A. Upon request of the Principal and/or his/her designee, an SRO may accompany students, coaches, and other school personnel from her/her assigned school to an event away from the assigned school to provide private security. Payment for the SRO shall be as set forth in the attached. Payment shall be provided by the school requesting the SRO services.
 - B. BCSD may request SROs and other Bluffton PD officers provide law enforcement, security, and crowd control services for extracurricular events, including but not limited to sporting events, carnivals, promos, graduations, overnight trips, dances, and drama productions so long as they shall be paid the hourly rate set forth in the attached. Payment shall be provided by the school requesting the law enforcement services.
 - C. The Parties, or their designated representatives, shall confer regarding the number of officers required and the number of work hours required for each such extracurricular event. BCSD shall pay to the Bluffton PD the hourly rate set forth in **Exhibit A** for no less than a minimum of two (2) hours per officer per event.
 - D. The hourly amount documented in **Exhibit A** may only be updated annually prior to the start of a new school year, and shall be documented in a written amendment to the Agreement.
 - E. The Parties agree and understand that requests for services must be cancelled by BCSD, or its designated representative, no later than 24 hours prior to the scheduled extracurricular event. The Bluffton PD may make exceptions to this cancellation notice requirement in special circumstances or for good cause. Failure to comply with the cancellation notice shall require BCSD to pay for two (2) hours of service per officer.
 - F. The Town shall be responsible for paying its officers for any work performed pursuant to this section. The Parties agree and acknowledge that at no time shall any officer of the Bluffton PD become an agent of BCSD. Any officers utilized pursuant to this section by BCSD shall at all times be independent contractors.
6. **PROGRAM GOALS AND EVALUATION.** The Parties shall develop program goals and objectives for the SRO program. The goals and objectives shall follow and be consistent with the BCSD action plan for a safe school climate. SROs shall be active law enforcement officials on campuses, classroom instructors, and resources for teachers, students, and parents. SROs shall be active in conferences, counseling, and referrals regarding students. Indicators of success shall be developed objectively and independently to measure how well goals and objectives were obtained. The Bluffton PD shall evaluate the effectiveness of the SRO program and report annually to the BCSD no later than July 31 of each calendar year.
7. **BCSD REQUIREMENT TO CONTACT LAW ENFORCEMENT WHEN CRIMINAL CONDUCT (LEVEL III) OCCURS.** Criminal conduct is defined as those activities engaged in by student(s) which result in violence to oneself or another's person or property or which pose a direct and serious threat to the safety of oneself or others in the school. Upon observation or notification and verification of a criminal offense or conduct that presents an immediate safety risk

to one or more people requiring a law enforcement referral, BCSD school administrators must contact the SRO who shall be the first line of contact for local law enforcement to ensure that the matter is resolved expeditiously to decrease significant interruption to the learning process.

8. RIGHTS AND DUTIES OF BCSD. BCSD shall provide to the full-time SRO of each school the following materials and facilities, which are deemed necessary to the performance of the SRO's duties:

- A. Access to an air-conditioned and properly lighted private office. This office shall contain a telephone which may be used for general business purposes.
- B. A location for files and records which can be properly locked and secured within the office.
- C. A desk with drawers, an office chair, work table, filing cabinet, office supplies, and computer with monitor and printer.

9. EMPLOYMENT STATUS OF THE SRO. SROs shall be and remain employees of the Bluffton PD and or the Town and shall not be employees of BCSD. The Parties acknowledge the SROs are law enforcement officers who shall uphold the law under the direct supervision and control of the Bluffton PD. SROs shall be and remain responsible to the chain of command of the Bluffton PD.

10. APPOINTMENT OF SROs. The Bluffton PD shall be responsible for recruiting, interviewing, and evaluating SROs, who shall serve at the pleasure of the Bluffton PD Chief. BCSD shall be afforded input into the evaluation of the SROs assigned to the school and shall make any information regarding SRO performance known and available to the Bluffton PD.

11. REASSIGNMENT/RESIGNATION/DISMISSAL OF SROs.

- A. In the event the Principal of the school to which an SRO is assigned believes the assigned SRO is not effectively performing his/her duties and responsibilities, the Principal shall notify the Superintendent or his/her designee regarding the concerns. The Parties so desire, they may meet to resolve the issues. If, within a reasonable amount of time after the meeting, the issues remain unresolved, or in the event the Chief or his/her designee does not desire a meeting because of the conduct or issues expressed the School, the SRO shall be reassigned from the school and a replacement shall be obtained.
- B. The Bluffton PD may dismiss or reassign an SRO based upon the Bluffton PD's rules, regulations, and/or general orders and when it is in the best interest of the citizens of Beaufort County.
- C. In the event of the resignation, dismissal, or reassignment of an SRO, or in the case of extended absences by an SRO, the Bluffton PD Chief shall make his/her best efforts to assign a temporary replacement for the SRO, and within thirty (30) school days of receiving notice of such extended absence, dismissal, resignation, or reassignment, a replacement shall be assigned.

12. ACCESS TO EDUCATIONAL RECORDS.

- A. BCSD agrees to allow an SRO assigned to a school to inspect and copy any public records maintained by the school, including student directory information.
- B. Assigned SROs and other Bluffton PD officers may not inspect and/or copy confidential student education records except in situations where immediate disclosure is necessary to protect the health and safety of students or other individuals.
- C. In the event the disclosure of confidential student education records is required in an emergency to protect the health or safety of the student or other individuals, BCSD representatives shall disclose to the SRO or Bluffton PD officer only such information necessary for the officer to respond to the emergency situation.
- D. In the event the Bluffton PD seeks confidential student records and no emergency situation exists, the BCSD shall release the requested confidential student record in accordance with the Family Educational Rights and Privacy Act (FERPA) and its implementing regulations.
- E. Assigned SROs and BCSD officials may otherwise share a student's confidential education records and juvenile records in accordance with State and Federal law.

13. SURVEILLANCE CAMERAS AND VIDEO RECORDINGS.

- A. The Parties, by and through Principals, Assistant Principals, and SRO assigned to the school to be served herein, shall jointly operate and monitor the school surveillance cameras to anticipate, prevent, or monitor possible violations of applicable law and BCSD policies and/or administrative regulations.
- B. BCSD shall own, place, and maintain surveillance cameras placed in or upon BCSD property.
- C. BCSD shall provide notice to employees, parents, and students that video surveillance occurs on BCSD property.
- D. Any recording made by a surveillance camera, on tape or digitally, shall be considered a public record as defined by applicable South Carolina law, subject to the following limitations:
 - 1. If not copied to DVD or other medium for use in conjunction with a school disciplinary proceeding or a criminal investigation, surveillance videos shall be maintained within the surveillance camera/computer system for the length of time such camera or system allows based on memory limitations.
 - 2. In the event a surveillance video recording is used or intended for use as evidence in a student disciplinary proceeding, the video recording shall be considered a confidential student record in accordance with FERPA and its implementing regulations.

3. BCSD agrees to provide the Bluffton PD with access to school surveillance videos for the purpose of investigating or prosecuting criminal misconduct and for the purposes of copying such videos pursuant to such investigations and prosecution in accordance with applicable State and Federal law, including but not limited to FERPA.

14. COMPLIANCE WITH LAW - LAW ENFORCEMENT PERMISSIONS.

- A. Uniformed law enforcement officers, as defined in S.C. Code of Laws § 23-24-10, may wear their uniforms and use their weapons and like equipment while performing private jobs in their off-duty hours with the permission of the law enforcement agency and governing body by which they are employed. The Bluffton PD certifies that its Class I officers may fulfill any off-duty services as contemplated and described herein and its Class III officers may fulfill any off-duty services at their respective, assigned schools, for overtime so long as it is pre-approved.
 - B. The Bluffton PD has determined that the off-duty services to be provided by its officers as contemplated and described herein are approved, the proposed off-duty services are not of such a nature as are likely to bring disrepute on the Bluffton PD, the officer, or the law enforcement profession, and the performance of such duties and the use of agency equipment is in the public interest.
15. **GOOD FAITH.** The Parties, and their agents and employees agree to cooperate in good faith in fulfilling the terms of this Agreement. Unforeseen difficulties or questions shall be resolved by negotiation between the Superintendent and the Chief, and/or their designees. Any recommended changes or modifications shall be reviewed by the Bluffton PD Chief and the Superintendent, or their designees, and any recommendations to the Agreement shall be submitted in writing.
 16. **TERM.** This Agreement shall be effective from the 1st day of July 2024, through 11:59 PM on the 30th day of June 2025 (the "Term"). This Agreement shall automatically renew for one (1) successive calendar year at a time beginning at the first day of July and concluding on the following 30th day of June subject to periodic amendments to the compensation paid by the BCSD and other terms as may be mutually agreed upon by the Parties. The Initial Term and any renewal terms shall be collectively referred to as the "Term". Each party reserves the right not to renew or to terminate this Agreement, effective at the conclusion of an annual Term, by providing written notice to the other no later than April 1 of any term.
 17. **COMPENSATION.** BCSD shall pay 75% of salary, benefits, equipment, vehicle and uniform costs generally, with the exception of any positions funded by state grant. See Exhibit A for the apportionment for the current fiscal year.
 18. **NOTICES.** All notices and communications under this Agreement shall be in writing and shall be deemed to be properly given upon the first to occur of the following: (i) upon receipt by the party to whom such communication is being given including via email; or (ii) three (3) business

days after being duly deposited in the United States mail, certified or registered, return receipt requested and addressed as follows:

To the Town:
Stephen Steese, Town Manager
ssteese@townofbluffton.com
20 Bridge Street
PO Box 386
Bluffton, SC 29910

To the Beaufort County SD
ATTN: Chief Financial Officer
Post Office Drawer 309
Beaufort, SC 29901

With a copy to:
ATTN: General Counsel
Post Office Drawer 309
Beaufort, SC 29901

- 19. **INDEPENDENT CONTRACTORS.** BCSD and the Bluffton PD are independent of one another and shall have no other relationship. Neither Party shall have, or hold itself out as having, the right or authority to bind or create liability for the other by its intentional or negligent act or omission, or to make any contract or otherwise assume any obligation or responsibility in the name of or on behalf of the other Party.
- 20. **COMPLIANCE WITH BCSD RULES AND REGULATIONS.** The Bluffton PD certifies its SROs shall comply with BCSD Administrative Regulations HRS-8, Drug-Free Workplace, and HRS-9, Tobacco-Free Workplace, as may be from time to time amended and which are incorporated herein by reference.
- 21. **COMPLIANCE WITH STATE REGULATION.** The Parties agree this Agreement complies fully with S.C. Code of Regulations 43-210. Upon final execution, BCSD shall provide a copy of this Agreement to the Town of Bluffton which shall be responsible for providing a copy to the Bluffton PD, who shall provide to the SROs. The BCSD shall provide a copy of this Agreement to school administrators and review its contents with them prior to the start of every school year.
- 22. **AMENDMENTS.** Any changes to this Agreement which are mutually agreed upon between the Parties shall be incorporated in a written amendment to this Agreement and shall not become effective until the amendment is signed by both Parties.
- 23. **ENTIRE AGREEMENT.** This document constitutes the entire agreement between the Parties. BCSD grants the Town all access rights and other rights necessary for the Town to perform its obligations under this Agreement. This Agreement is independent of any other agreements between the Parties.
- 24. **NON-DISCRIMINATION.** BSCD does not discriminate against any individual on the basis of race, religion, gender, gender identity, sexual orientation, sex, pregnancy, childbirth, or any related medical conditions, color, physical or mental disability, age (40 or older), ancestry, genetic information, national origin, or any other applicable status protected by Title VI, Title VII, Title IX or any other local, state, or federal law.

- 25. GOVERNING LAW.** Any dispute, claim, or controversy relating to this Agreement and all the rights and obligations of the Parties shall, in all respects, be interpreted, construed, enforced and governed by and under the laws of the State of South Carolina.
- 26. EXPENSES.** Each Party shall bear and be responsible solely for its own costs and expenses necessary to comply with this Agreement.
- 27. SEVERABILITY.** Should a court of competent jurisdiction rule any portion of this Agreement invalid, null, or void, that fact shall not affect or invalidate any other portion or section of this Agreement and all remaining portions and sections of this Agreement remain in full force and effect.
- 28. MERGER.** This Agreement constitutes a final written expression of the Terms herein to be signed by the Parties' duly authorized officers.

IN WITNESS WHEREOF, the Parties hereto have executed this Agreement as set forth below.

BEAUFORT COUNTY SCHOOL DISTRICT

BY: _____
Frank J. Rodriguez, Ph.D.
Superintendent

BY: _____
Stephen Steese
Town Manager

EXHIBIT A

COSTS

Annual Costs for School Fiscal Year 2024/2025		
75%	25%	100%
\$400,017.00	\$133,339	\$533,356

In accordance with Paragraph 17, Beaufort County School District reimburses Town of Bluffton 75% of salary, fringe benefits, vehicle costs, uniforms and equipment costs for the SROs listed in Paragraph 4. This is not inclusive of grant-funded SROs nor separate arrangements for extra-duty assignments, which are paid at 100% of the hourly rate and covered by Paragraph 5.

Extra-duty assignment hourly rate (requires 2 hour min)	\$52.50 per hour
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Salary is subject to annual increases as determined by Bluffton PD. Fringe benefits are subject to annual increases as determined by the South Carolina Public Employee Benefits Administration. An increase in costs will be presented prior to the start of the school year as a written amendment to the Agreement.

SCHOOL CROSSING GUARD AGREEMENT

BETWEEN

THE BEAUFORT COUNTY SCHOOL DISTRICT

AND THE TOWN OF BLUFFTON

School Year 2023-2024

THIS SCHOOL CROSSING GUARD AGREEMENT (the "**Agreement**") for the School Crossing Guard Program is being entered into by and between the Town of Bluffton, a South Carolina municipal corporation, created and existing pursuant to S.C. Code Ann. § 5-7-10, *et seq.*, located wholly within Beaufort County (the "**Town**") and the Beaufort County School District, Beaufort County South Carolina (the "**District**") on the following terms and conditions.

WHEREAS, the Town and the District share common and mutual interests in ensuring the safety of the Town's citizenry and the children attending schools located within the corporate limits of the Town; and,

WHEREAS, the Town and the District have agreed to develop and implement a School Crossing Guard Program upon the terms and conditions set forth in this Agreement; and,

WHEREAS, the Town and the District are authorized to enter this Agreement by virtue of the provisions of Article VIII, Section 13 of the South Carolina Constitution; and,

WHEREAS, the Parties have determined that it is reasonable, necessary, and in the public interest and welfare for the Parties to cooperate and coordinate to ensure the safety of the children, parents and others attending and visiting schools within the Town, as set forth more thoroughly herein.

NOW, THEREFORE, for and in consideration of the mutual promises, undertakings and covenants set forth herein, the receipt and sufficiency of which are hereby acknowledged and affirmed by the District and the Town, the Parties hereby agree as follows:

1. **Recitals Incorporated.** The forgoing recitals are hereby incorporated as though fully set forth herein.
2. **Rights and Duties of the Bluffton Police Department**
 - A. The Town of Bluffton, by and through the Bluffton Police Department (the "**BPD**") shall provide to the District the personnel equipped and trained in appropriate procedures for controlling and directing traffic and pedestrians at or near certain schools within the Town in the manner and at the locations indicated below (the "**School Crossing Guards**"). The locations and times set forth below may be modified by the agreement of the parties based on statistics of vehicular and student traffic in locations near and around the schools assigned. During the term of this Agreement, the Town shall provide eight (8) School Crossing Guards, who shall be stationed at the following locations and at the following times:

1. One Hour Posts

One Crossing Guard (relocated to second post after first post concludes)

- MC Riley Elementary School: 0700-0800 and 1400-1500
- Bluffton Middle School at Simmons Road: 0800- 900 and 1500-1600

One Crossing Guard (relocated to second post after first post concludes)

- Red Cedar Elementary at Box Elder Street: 0700-0800 and 1400-1500
- Bluffton Middle School at Buck Island Road: 0800-0900 and 1500-1600

One Crossing Guard (relocated to second post after first post concludes)

- Pritchardville Elementary: 0700-0800 and 1400-1500
- River Ridge Academy: 0800-0900 and 1500-1600

One Crossing Guard (relocated to second post after first post concludes)

- Red Cedar Elementary at 9th Ave and Red Cedar Street: 0700-0800 and 1400-1500
- River Ridge Academy: 0800-0900 and 1500-1600

One Crossing Guard (relocated to second post after first post concludes)

- Red Cedar Elementary: 0700-0800 and 1400-1500
- May River High School: 0800-0900 and 1500-1600

2. Two Hour Posts

Two Crossing Guards each at

- H.E. McCracken Middle/Bluffton Elementary at McCracken Circle: 0700-0900 and 1400-1600
- H.E. McCracken Middle/Bluffton Elementary at Buckwalter Parkway: 0700-0900 and 1400-1600

B. The Chief of Police shall assign a Sergeant to oversee the School Crossing Guards and their schedules, time sheets, and leave requests.

C. The Chief of Police shall provide a yearly report of incidents to the Beaufort County School District. This end-of-year report will include a narrative explanation, if applicable, to the extent permitted by law.

D. The Chief of Police, when necessary, or their designee, will use best efforts to meet with the principals of the schools to discuss and mutually evaluate the progress of the program.

E. The Town shall provide eight (8) School Crossing Guards working the anticipated One Hundred and Eighty (180) annual school days in the Beaufort County School District calendar. In the event the District must modify its calendar to accommodate the academic needs of its students, the Town agrees to use its best efforts to coordinate with the District to provide School Crossing Guards on any such days. The District must notify the Town via the Chief of Police of any changes which may need to occur in hours of work or locations based on changes in the District calendar no less than ten (10) days prior to the day on which services are to be provided.

F. Duties of School Crossing Guards.

- 1) The School Crossing Guards shall work at assigned intersections during the scheduled hours of work and/or will notify the on-call Sergeant should an absence occur.
- 2) The School Crossing Guards shall wear department-issued protective vests and outerwear in accordance with South Carolina law.
- 3) The School Crossing Guards shall conduct traffic control at assigned posts in a manner consistent with standards recognized as being employed by School Crossing Guards in the State of South Carolina and utilizing the traffic control equipment provided by the BPD.

3. **Program Evaluation**

- A. The BPD and the District shall evaluate the necessity of the program annually.
- B. The BPD shall choose a random day each quarter and count the number of students crossing the assigned roadways and the number of vehicles passing the intersection for each location for the morning and afternoon hours.

4. **Rights and Duties of the Beaufort County School District**

- A. The District shall be responsible for 100% of the associated costs of the School Crossing Guard program, which are detailed in Paragraph 12 of this Agreement.
- B. If this Agreement is terminated by either the District or the Town, each Party agrees that the equipment purchased by the District is the property of the District with the exception of the uniforms and related accessories.

5. **Employment Status of School Crossing Guards.** School Crossing Guards shall be and remain employees of the Town of Bluffton and shall not be employees of the Beaufort County School District.

6. **Appointment of School Crossing Guards.** The BPD shall be responsible for recruiting, hiring, training, and evaluating School Crossing Guards who shall serve at the pleasure of the Chief of Police.

7. **Reassignment/Resignation/Dismissal of School Crossing Guards**

- A. In providing services under this Agreement, all School Crossing Guards shall conform to high standards of work and professionalism. If, during the term of this Agreement, a principal determines that a School Crossing Guard is not effectively performing their duties and responsibilities, the principal shall immediately notify the Chief of Police. The Chief of Police or designee will promptly review the concerns. Within ten (10) business days from receipt of the notification from the principal, the Chief of Police will schedule a meeting with the principal, the Lieutenant and/or Sergeant in the School Crossing Guard's supervisory chain, the Town's Director of Human Resources, and the School Crossing Guard for the purpose of mediating/addressing/resolving the concerns of the principal.
- B. In the event of a resignation, dismissal, or extended absence of a School Crossing Guard, the Chief of Police may direct patrol officer to temporarily fill the assigned duties until the School Crossing Guard returns or another is hired.

8. Good Faith

- A. The Beaufort County School Board, the school principals of Beaufort County Schools, and the Chief of Police of the Bluffton Police Department agree to cooperate in good faith in fulfilling the terms of this Agreement.
- B. Unforeseen difficulties or questions shall be resolved by negotiation between a principal and the Chief of Police or their designees.
- C. This Agreement shall be reviewed annually by the District Superintendent of Schools and the Chief of Police no later than May 31 of the year in which the Agreement shall terminate. Any recommended changes or modifications should be submitted in writing no later than June 30 of that same calendar year.

9. **Modification.** This document constitutes the full understanding of the parties, and no terms, conditions, understandings or agreements purporting to modify or vary the terms of this document shall be binding unless made in writing and signed by the parties to be charged.

10. **Merger.** This Agreement constitutes a final written expression of all of the terms of this Agreement and is a complete and exclusive statement of those terms.

11. Term and Termination

- A. Notwithstanding the date of execution of this Agreement, the term of this Agreement shall be effective commencing on July 1, 2024 through June 30, 2025 (the "**Term**"). This Agreement shall automatically renew for successive one-year terms upon the same terms and conditions unless otherwise amended by the Parties in accordance herewith.
- B. Each Party shall have the right to terminate this Agreement by providing written notice to the other party directed to the Town Manager or the District Superintendent of Schools, as applicable, no less than thirty (30) days prior to the renewal of any term.

12. Compensation

- A. Amount payable for the 2024-2025 school year is **\$151,256** comprised of salary, fringe benefits, equipment, and uniforms; the School District shall reimburse 100% of this amount.
- B. The Town of Bluffton will invoice the School District twice a year, once in December and once in June.

[Remainder of Page Intentionally Omitted. Signature Page(s) to Follow.]

IN WITNESS WHEREOF, the Parties have caused this Agreement to be signed by their duly authorized officers.

Signed, sealed and delivered in the presence of:

<hr/>	<hr/>
Dr. Frank Rodriguez	Stephen Steese
Superintendent	Town Manager
Beaufort County School District	Town of Bluffton
<i>date</i>	<i>date</i>

Attachment 3

A RESOLUTION

RELATING TO THE TOWN OF BLUFFTON, SOUTH CAROLINA, SUPPORT OF AGREEMENTS BEAUFORT COUNTY SCHOOL DISTRICT

NOW, THEREFORE, BE IT RESOLVED, by the Town Council (the “Council”), as the governing body of the Town of Bluffton, as follows:

1. The Council hereby declares that this Resolution shall constitute its consent to the intergovernmental agreements with the Beaufort County School District to support staffing of School Resource Officers and Crossing Guards.

Approved this 11th day of June 2024.

Larry Toomer, Mayor

Town of Bluffton, South Carolina

ATTEST:

Marcia Hunter, Town Clerk

Town of Bluffton, South Carolina

SEAL

Attachment 4

Recommended Motion

Consideration to approve a resolution for execution of two Intergovernmental Agreements between the Town of Bluffton and the Beaufort County School District to support staffing of School Resource Officers and Crossing Guards – Felicia Roth, Director of Compliance and Contracts

“I make a motion to approve a resolution for execution of two Intergovernmental Agreements between the Town of Bluffton and the Beaufort County School District to support staffing of School Resource Officers and Crossing Guards.”

TOWN COUNCIL

STAFF REPORT
Executive Department



MEETING DATE:	June 11, 2024
PROJECT:	Consideration of an Intergovernmental Agreement Renewal between the Town and The Fourteenth Circuit Public Defender’s Office for indigent representation
PROJECT MANAGER:	Felicia Roth, Director of Compliance and Contracts

RECOMMENDATION: Staff recommends renewal of the Fourteenth Circuit Public Defender agreement.

BACKGROUND/DISCUSSION: The Town currently has a multi-jurisdictional agreement with the Fourteenth Circuit Public Defenders Office which will expire on July 1, 2024. Each jurisdiction, including the Town of Bluffton, the City of Beaufort, and the Town of Port Royal each provide funds towards indigent defense services.

The renewal would include the following shared costs:

- \$137,280 split between Bluffton Port Royal and Beaufort for public defender services and administrative assistant
- \$76,164 split between Bluffton Port Royal and Beaufort for public defender services at bond hearings
- \$50,000 split between Bluffton Port Royal and Beaufort for additional public defender to help with case load.
- \$1,200 split between Bluffton and Port Royal for supplies

NEXT STEPS: Authorizing the Town Manager to sign the renewal agreement with the Fourteenth Circuit Public Defender’s Office.

ATTACHMENTS:

1. Intergovernmental Agreement
2. Resolution
3. Motion

TOWN COUNCIL

STAFF REPORT
Executive Department



MEETING DATE:	June 11, 2024
PROJECT:	Consideration of an Intergovernmental Agreement Renewal between the Town and The Fourteenth Circuit Public Defender’s Office for indigent representation
PROJECT MANAGER:	Felicia Roth, Director of Compliance and Contracts

RECOMMENDATION: Staff recommends renewal of the Fourteenth Circuit Public Defender agreement.

BACKGROUND/DISCUSSION: The Town currently has a multi-jurisdictional agreement with the Fourteenth Circuit Public Defenders Office which will expire on July 1, 2024. Each jurisdiction, including the Town of Bluffton, the City of Beaufort, and the Town of Port Royal each provide funds towards indigent defense services.

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- \$50,000 split between Bluffton Port Royal and Beaufort for additional public defender to help with case load.
- \$1,200 split between Bluffton and Port Royal for supplies

NEXT STEPS: Authorizing the Town Manager to sign the renewal agreement with the Fourteenth Circuit Public Defender’s Office.

ATTACHMENTS:

1. Intergovernmental Agreement
2. Resolution
3. Motion
4. Exhibit A

EXTENSION OF AGREEMENT TO FUND MUNICIPAL COURT ATTORNEY

This Agreement is entered into by and between the Fourteenth Circuit Public Defender (the Public Defender), and the following Municipalities: The City of Beaufort, the Town of Bluffton and the Town of Port Royal (collectively the Municipalities).

WHEREAS, on or about December 17, 2019, the Public Defender and the Municipalities entered into an Agreement To Fund Municipal Court Attorney (the Agreement); and,

WHEREAS, the term of the Agreement ran until July 1, 2024; and,

WHEREAS, the Agreement provides that it may be extended for additional one-year terms at the mutual agreement of the parties; and,

WHEREAS, the parties now wish to extend the Agreement for an additional one-year term, until July 1, 2025;

NOW THEREFORE, the parties hereby agree as follows:

1. The Agreement shall be extended for an additional one-year term, until July 1, 2025.
2. In December, 2024, the parties will meet to discuss existing case counts, staffing changes (including the possible need of an additional attorney), other contract needs, and any clarifications arising from the underlying Settlement Agreement and Federal Court Order, for possible implementation in the FY 2025-26 extension/modification of the Agreement.
3. With these exceptions, all other terms and conditions of the Agreement shall remain unchanged and in force and effect.
4. The cost for the annual contract is set out in Exhibit A.

IN WITNESS WHEREOF, the Public Defender, and the Municipalities executed this Agreement

TOWN OF BLUFFTON

CITY OF BEAUFORT

By: _____

By: _____

Its: _____

Its: _____

Date: _____

Date: _____

Witness: _____

Witness: _____

FOURTEENTH JUDICIAL CIRCUIT
PUBLIC DEFENDER

TOWN OF PORT ROYAL

By: _____

By: _____

Its: _____

Its: _____

Date: _____

Date: _____

Witness: _____

Witness: _____

Attachment 3

Recommended Motion

Consideration to Approve a Resolution for Execution of an Intergovernmental Agreement between the Town and the Fourteenth Circuit Public Defenders Office for indigent defense representation.

"I make a motion to adopt the Resolution to Renew the Agreement Extension with the Fourteenth Circuit Public Defenders Office for indigent defense representation for the Town of Bluffton.

Attachment 4

“EXHIBIT A”

Town of Bluffton	\$87,815.00
City of Beaufort	\$87,815.00
Town of Port Royal	\$87,815.00

Additional Considerations:

- City of Beaufort will supply office space and automobile.
- Town of Bluffton and Town of Port Royal will provide office supplies and postage reimbursement for administrator/investigator and attorney.
- The Public Defender will bill separately for expert services on a case-by-case basis, and the respective municipality will pay for those services.

Attachment 2

A RESOLUTION

RELATING TO THE TOWN OF BLUFFTON, SOUTH CAROLINA, SUPPORT OF AGREEMENT WITH
FOURTEENTH CIRCUIT PUBLIC DEFENDERS OFFICE

NOW, THEREFORE, BE IT RESOLVED, by the Town Council (the “Council”), as the governing body of
the Town of Bluffton, as follows:

1. The Council hereby declares that this Resolution shall constitute its consent to the
intergovernmental agreement with the Fourteenth Circuit Public Defenders Office for indigent
defense representation.

Approved this 11th day of June 2024.

Larry Toomer, Mayor
Town of Bluffton, South Carolina

ATTEST:

Marcia Hunter, Town Clerk
Town of Bluffton, South Carolina

SEAL

Attachment 3

Recommended Motion

Consideration to Approve a Resolution for Execution of an Intergovernmental Agreement between the Town and the Fourteenth Circuit Public Defenders Office for indigent defense representation. --- Felicia Roth, Director of Compliance and Contracts

“I make a motion to adopt the Resolution to Renew the Agreement Extension with the Fourteenth Circuit Public Defenders Office for indigent defense representation for the Town of Bluffton.”

TOWN COUNCIL

STAFF REPORT
Executive Department



MEETING DATE:	June 11, 2024
PROJECT:	Consideration to Approve a Contract Renewal with USCB on Bluffton Ambassador Program
PROJECT MANAGER:	Felicia Roth, Director of Compliance and Contracts

REQUEST: Town Staff requests Town Council to authorize the Town Manager to renew the agreement with University of South Carolina – Beaufort for the Bluffton Ambassador program for fiscal year 25.

BACKGROUND: Since 2018, the University of South Carolina – Beaufort (USCB) has provided the Town of Bluffton with classes on the history and culture of what makes the Town unique. Provided by USCB's Center for Event Management and Hospitality Training, the Bluffton Ambassador Program has grown to give nine courses total and train approximately 145 ambassadors annually.

Attached to the updated contract renewal is the annual budget which includes staff salary and fringe benefits, contract services, printing costs, supplies for a contract total of \$32,500.

NEXT STEPS: Town Council to approve to renew the contract with USCB for the Bluffton Ambassador program for next year.

SUMMARY: The contract between Town of Bluffton and USCB for the Bluffton Ambassador program is \$32,500.

ATTACHMENTS:

1. Town of Bluffton Agreement 2018-34 renewal for FY25
2. Recommended Motion
3. Resolution

UNIVERSITY OF SOUTH CAROLINA) Bluffton Ambassador Program Agreement
) Between the Town of Bluffton, the University of South
COUNTY OF BEAUFORT) Carolina, and the University of South Carolina Beaufort

WHEREAS, this AGREEMENT was made and entered into on the 19th day of December 2017 by and between the University of South Carolina, a public university of the State of South Carolina (hereinafter "USC"), University of South Carolina Beaufort, an institution of the USC system (hereinafter "USCB"), and the Town of Bluffton, a political subdivision of the State of South Carolina (hereinafter "Town"). USCB and the Town may collectively be referred to herein as the "Parties."

WHEREAS, Bluffton is a unique southeastern coastal community, whose blend of historical features coupled with growth and economic vitality lend themselves to be communicated through formal presentation; and

WHEREAS, USCB is an ever-growing university with the capability to develop and deliver the content of the Program as defined in this Agreement; and

WHEREAS, through partnership with USCB, the Town will be able to deliver important information about the Town to residents, community stewards, guests and stakeholders in the Town's continued success; and

WHEREAS, the Program will be a collaboration between the Town and USCB's Center for Event Management and Hospitality Training; and

WHEREAS, such collaboration and partnership provides an opportunity for a mutually beneficial relationship for the Town and USCB; and

WHEREAS, the initial term of this Agreement commenced on July 1, 2017 and continued for a period of one year, and was renewed for seven (7) one-year terms, ending on June 30, 2024; and

NOW, THEREFORE, for due and valuable consideration, the Parties agree as follows:

1. Term of the Agreement.
 - a. The Agreement shall be effective from July 1, 2024 through June 30, 2025.
 - b. The Agreement shall automatically renew under the same terms on July 1 of each successive year unless terminated in accordance with this Agreement.
 - c. Modifications, including to budget, require written mutual agreement at least 90 days prior to the end of any term.
2. Bluffton Ambassador Program Content. The Program will be an educational program with the goal of informing residents, community stewards, guests and stakeholders in the Town's

continued success about the community of Bluffton. The Program will be two to three hours in length and will cover the following topics:

- a. History of the Town of Bluffton;
- b. Town of Bluffton vision and mission;
- c. Governmental structure of the Town of Bluffton;
- d. Town of Bluffton strategic priorities;
- e. Culture of the Town of Bluffton; e.g. why Bluffton is the “Heart of the Low Country”;
- f. Importance and ecological impact of the May River and surrounding watershed;
- g. Opportunities for civic engagement in the Town of Bluffton.

3. USCB Responsibilities. USCB will provide the following professional services in relation to this Agreement:

- a. Development of the Bluffton Ambassador Program. USCB will develop the Bluffton Ambassador Program through the use of all necessary research, focus groups, consultant meetings, content development, video production, photo management with all necessary rights being secured as well as any additional services for professional program development;
- b. Updates of the Bluffton Ambassador Program. USCB will annually assess and update the Program’s content to incorporate the latest available data (such as statistics and demographics) as well as the Town’s current Strategic Priorities, initiatives in action, and accomplishments for the previous year;
- c. Program Presentation. USCB will present the Bluffton Ambassador Program using professional educators at the discretion of USCB, subject to Town approval. USCB will present a minimum of three complete programs annually, plus additional programs in subsequent renewal terms as each annual budget may specify;
- d. Certification. USCB will certify all individuals who complete the Program as “Bluffton Ambassadors”.
- e. Records. USCB will maintain a master list of all individuals who attend all or a portion of any Program presentation as well as the master list of all certified Bluffton Ambassadors.
- f. Evaluations. USCB will develop a suitable evaluation instrument to be utilized at each Program presentation, communicating with the Town on all aspects of the Program, and promoting the Program as a collaboration between USCB and the Town.

- g. Notice. Under University funding requirements, a Principal Investigator shall be named for each grant of funding, as the University considers this Agreement. The Principal Investigator shall be mutually agreeable to USCB and the Town. Should USCB need to change the Principal Investigator, adequate notice should be provided to the Town.
4. Town Responsibilities. The Town will provide the following funding and professional services in relation to this Agreement:
- a. Funding. At least ninety (90) days prior to the expiration of the Extension Term, USCB and Town Staff shall coordinate and agree upon a proposed budget to continue the Program for the next term. The Proposed Budget shall be submitted to Bluffton Town Council for review and approval, and adopted by Resolution. Thereafter, this Agreement shall then be modified by a mutually executed amendment with the Resolution and budget attached.
 - b. Expertise and Information. To the extent allowed by law, Town Staff and volunteers agree to cooperate with USCB in providing all relevant information concerning the Town of Bluffton, the functioning of its Government, the history of its community, the ecology of the surrounding area, and all other relevant information at its disposal as requested by USCB.
 - c. Marketing. The Town will assist in the marketing of the Program using its various tools as it deems necessary.
 - d. Coordination. To the extent allowed by law, the Town will work with USCB in sharing contacts and support of the Program with key individuals and organizations in the community with information needed to develop the Program, to include introduction, support of the Program, and assistance with promoting the Program.
5. General Terms and Conditions.
- a. The Town Manager, their designee, or USCB may terminate the Agreement with ninety (90) days written notice, in whole or in part, at any time for the convenience of that party. If this Agreement is terminated early by either party, USCB shall be reimbursed only for those expenses incurred up to the date of termination.
 - b. The Parties hereto intend that no master/servant, employer/employee, or principal/agent relations will be created by this Agreement. Nothing contained herein creates any relationship between the Town and USCB other than that which is expressly stated herein. The Town is interested only in the results to be achieved under this Agreement. The conduct and control of USCB's agents and employees and methods utilized in fulfilling its obligations hereunder shall lay solely and exclusively with USCB. USCB's agents or employees shall not be considered employees of the Town for any purpose. No person employed by USCB shall have any benefit, status, or right of employment with the Town.

[Remainder of Page Intentionally Omitted. Signature Page(s) to Follow.]

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed by their duly appointed officers this day and year as aforwritten.

UNIVERSITY OF SOUTH CAROLINA

By: _____

Print Name: _____

Its: _____

**UNIVERSITY OF SOUTH CAROLINA
BEAUFORT**

By: _____

Print Name: _____

Its: _____

TOWN OF BLUFFTON

By: _____

Print Name: _____

Its: _____

EXHIBIT A

RESOLUTION

This continued relationship will be approved by Town Council on Consent Agenda, therefore no resolution shall be attached. Approval may be found in the meeting minutes.

EXHIBIT B

BUDGET

Attachment 2

A RESOLUTION

RELATING TO THE TOWN OF BLUFFTON, SOUTH CAROLINA, SUPPORT OF A CONTRACT WITH USCB

NOW, THEREFORE, BE IT RESOLVED, by the Town Council (the “Council”), as the governing body of the Town of Bluffton, as follows:

- 1. The Council hereby declares that this Resolution shall constitute its consent to the contract with USCB for the Bluffton Ambassador program.

Approved this 11th day of June 2024.

Larry Toomer, Mayor
Town of Bluffton, South Carolina

ATTEST:

Marcia Hunter, Town Clerk
Town of Bluffton, South Carolina
SEAL

Attachment 3

Recommended Motion

Consideration to approve a resolution to execute a contract between the Town of Bluffton and USCB for the Bluffton Ambassador program. – Felicia Roth, Director of Compliance and Contracts

“I make a motion to approve a resolution for execution of a contract between the Town of Bluffton and USCB for the Bluffton Ambassador program.”

TOWN COUNCIL

STAFF REPORT
Executive Department



MEETING DATE:	June 11, 2024
PROJECT:	Consideration to Approve a Contract Renewal for Vehicle Maintenance with the Bluffton Township Fire District
PROJECT MANAGER:	Felicia Roth, Director of Compliance and Contracts

REQUEST: Town Staff requests Town Council to authorize the Town Manager to renew the agreement with Bluffton Township Fire District for vehicle maintenance for Fiscal Year 25.

BACKGROUND: Last year, the Town spent approximately \$147,000 on vehicle maintenance with the Fire District. Although replacing our fleet with newer vehicles means less money on costly repairs, routine maintenance and repairs are still required, and the rates charged by the Fire District is competitive compared to the open market. Staff has provided the renewal agreement to the Fire District and has not received word of any rate increase for the upcoming fiscal year.

NEXT STEPS: Town Council to approve to renew the contract with Bluffton Township Fire District for vehicle maintenance for next year.

SUMMARY: The contract between Town of Bluffton and Bluffton Township Fire District for Vehicle Maintenance for Fiscal Year 25.

ATTACHMENTS:

- 1. Town of Bluffton Agreement 2025-03
- 2. Resolution
- 3. Recommended Motion

BLUFFTON TOWNSHIP FIRE DISTRICT VEHICLE SERVICES
19 ULMER ROAD
BLUFFTON, SC 29910
T-843-757-1009
F-843-757-7305

VEHICLE MAINTENANCE SERVICES AGREEMENT

STATE OF SOUTH CAROLINA)
)
COUNTY OF BEAUFORT)

AGREEMENT

This agreement is made the 1st day of July 2024, between Bluffton Township Fire District dba as BTFD Vehicle Services (hereinafter referred to as “BTFD VS”) and The Town of Bluffton (hereinafter referred to as “TOB”). This agreement is for BTFD VS to provide vehicle maintenance services to TOB, including The Bluffton Police Department as defined below.

1. SERVICES

BTFD VS will provide the following preventative maintenance services (“PM”) and repair services.

- Tune ups, fluid changes, filter replacement.
- Electronic diagnostic & repair services.
- All door window, trim, handles, and interior needs.
- Starting, braking, charging, cooling & A/C system's services.
- Steering & drive wheel service and repair.
- Tire replacement and balancing service.
- Alignment service.
- Engine and or transmission replacement.
- With consent, manage other needed outsourced services not listed here.

Any services not listed or that would need to be obtained or purchased from an outside agency would be subject to written approval (email will suffice) from TOB designee.

2. PERSONNEL

BTFD VS Technicians are trained to the highest level and are Automotive Service Excellence (ASE) & Emergency Vehicle Technician (EVT) certified in the following disciplines.

2. PERSONNEL (cont.)

ASE:

A1 – Auto Engine Repair, A4 – Auto Suspension & Steering, A5 – Auto Brakes, A7 – Auto A/C Heating, T2 – Truck Diesel Engines, T3 – Truck Drive Train, T4 – Truck HD Brakes, T5 – Truck Suspension & Steering, T6 – Truck Electrical, T7 – Truck A/C & Heating, T8 – Truck Preventive Maintenance.

EVT:

F2 – Fire Apparatus Design & Performance Standards, F3 – Fire Pumps & Accessories, F4 – Fire Apparatus Electrical Systems, F5 – Aerial Apparatus.

3. VEHICLE CLASSIFICATION

BTFD VS will utilize the US Department of Transportation classification of vehicles. They are as follows.

Group 1, Passenger Vehicles / Light Duty Trucks

1. Class 1- GVWR ranges from 0 to 6,000 pounds (0 to 2,722 kg)
2. Class 2- GVWR ranges from 6,001 to 10,000 pounds (2,722 to 4,536 kg)
3. Class 3- GVWR ranges from 10,001 to 14,000 pounds (4,536 to 6,350 kg)

Group 2, Medium Duty Trucks

4. Class 4- GVWR ranges from 14,001 to 16,000 pounds (6,351 to 7,257 kg)
5. Class 5- GVWR ranges from 16,001 to 19,500 pounds (7,258 to 8,845 kg)
6. Class 6- GVWR ranges from 19,501 to 26,000 pounds (8,846 to 11,793 kg)

Group 3, Heavy Duty Trucks

7. Class 7- GVWR ranges from 26,001 to 33,000 pounds (11,794 to 14,969 kg)
8. Class 8- GVWR is anything above 33,000 pounds (14,969 kg)

Any vehicle and equipment not mentioned in the above groups will be classed and rate quoted prior to service work done. Example, a backhoe would fall in Group 2 and a golf cart would fall in Group 1.

4. LABOR RATES

The following labor rates will prevail to the applicable vehicle group.

Group 1, Passenger Vehicles / Light Duty Trucks – \$100/hour

Group 2, Medium Duty Trucks & Equipment – \$115/hour

Group 3, Heavy Duty Trucks & Heavy Equipment – \$130/hour

4. LABOR RATES (cont.)

Labor Rate Example:

All labor charges will be determined by book rates from ALLDATA. ALLDATA can be referenced on the internet via www.alldata.com. *Example:* a repair / service job on a Group 1 vehicle with a book rate of 2.5 hours will cost \$187.50 (2.5 x \$75) in labor charges, not including parts. Not all services or repairs have a book rate, and in these cases the applicable group and hourly labor rate will prevail.

5. SHOP & OTHER ADMINISTRATIVE CHARGES

All invoices are subject to additional charges that may include any or all of the following.

Shop Supplies: any supplies or portion thereof that is used in the process of the repairs or service. The shop supplies fee is equal to 10% of all parts billed on the invoice, but not to exceed a maximum of \$50.

Administrative Fees: fees charged for administration work, such as reports requested or work other than the repair or service. *Example:* if Public Works detailed a lawn area during the day, and at the end of the day dropped the trailer of equipment to be serviced, without cleaning the equipment, there would be a charge for cleaning the equipment so the technician could service / repair the equipment. This fee would be charged at the prevailing hourly rate, subject to the proper category in section 4.

Diagnostic Fee: if diagnostic service is required, the fee charged is for use of computer equipment to obtain diagnostic codes, use of scope during repair, to clear codes after repairs or service have been completed, and to validate proper repair has been made. The diagnostic fee is equal to 1 hour of the prevailing rate in section 4 and includes up to 1 hour of technician time.

Tire Disposal Fee: Used tires from vehicles will need to be properly disposed of. The disposal fees for used tires vary, depending on the tire size. The pricing is as follows.

Passenger car sized tires – \$5 per tire.

Light truck tires – depending on size, \$7 to \$10 per tire. To be determined at repair time.

Large truck tires – \$15 per tire

Super singles – \$25 per tire

Agriculture / Industrial – Depending on size, \$55 to \$110 per tire. To be determined at repair time.

6. PARTS

All parts purchased for repairs / service will be added to the invoice, including any environmental or hazardous materials fees that are applicable. Most competitive repair shops multiply the parts cost by 2 ½ times the total cost. *Example:* a competition shop would upcharge a \$75 part to cost \$187.50. BTFD VS parts are charged at cost plus 25%. *Example:* a \$75 part will cost \$93.75. BTFD VS has an extensive parts network and strives to obtain the best pricing possible for quality parts.

6. PARTS (cont.)

If parts are not in stock, either by BTFD VS or the supplier and need to be ordered, the repair or service appointment may have to be rescheduled.

7. PROCEDURE

We understand that each entity has its own process for handling maintenance and repairs. We will work together to put a process in place that best suites and meets the needs of both parties. Our contact process is simple and straight forward. The TOB designee will contact Steve McKinley, Battalion Chief, Maintenance Division. His email is, mckinley@blufftonfd.com. His phone numbers are, O – 843-548-4366 & C – 843-247-2954.

The procedure is as follows, the TOB Bluffton Police Department Vehicle Maintenance Form will need to be completed per BPD protocol. Once the form is completed, the BPD Quartermaster will email the form to, vehicleservices@blufftonfd.com. Once received, the request will be given a work order number, scheduled, and assigned. The scheduled information will then be emailed back to the BPD Quartermaster.

Once the scheduled appointments are confirmed, please have the scheduled vehicles at maintenance before 9:00 am, unless prior arrangements are made.

If your entity has a particular protocol, please include as appendix to this document.

If TOB requires a purchase order for the work order, BTFD VS will need the purchase order prior to providing service. Please indicate if a purchase order is required. YES / NO Initials please; _____

After the repairs / service have been completed, the TOB designee will be notified that the unit is ready to be picked up.

Please list approved TOB designees. Designees have the authorization to approve repairs and service for TOB. Please provide a primary designee and at least one alternate. (Please print)

Name	Title	Phone #	Email
1. _____		843-540-____	
2. Joe Babkiewicz, Police Chief		843-540-3949	jbabkiewicz@townofbluffton.com

8. SOFTWARE AGREEMENT AND FEES

With the start of fiscal year 24/25, BTFD Vehicle Services is bringing on a new cloud-based Record Management System (RMS). In addition to BTFD, this system will allow all Town of Bluffton employees that are assigned or periodically drive a Town owned vehicle to report and request maintenance and or service concerns to the Towns Quartermaster (QM). The QM will approve & forward the request, electronically, to BTFD Vehicle Services for scheduling. Once a scheduled date has been assigned the request is sent back to the QM and the Town employee that made the request. Simply put, it's all electronic and everyone who is associated with the request will receive all updated information live. In addition, the Town will have its own RMS module and access to all TOB/BPD vehicle records, history, and numerous reports.

The system is APP based, so it can be accessed from anywhere with computer, iPad or cell phone. In previous meetings, the Town has agreed to participate in the program and committed to their share of the set-up fee and software module. The Towns portion of the one-time setup fee is \$2,085. and the Towns software module cost is \$5,500. The total cost for the Town, for fiscal year 24/25 is \$7,585.

The agreement with the software vendor is for three (3) years. For the fiscal years 25 & 26, the software cost will be \$5,500 per year. BTFD has agreed to pay this in advance on the Towns behalf and the Town will be billed & invoiced during the 1st week of July of each year. They are as follows.

Fiscal Year 24/25 - \$7,585. Fiscal Year 25/26 - \$5,500. Fiscal Year 26/27 - \$5,500.

The Town agrees to the software terms, TOB initial_____

9. GREEN LIGHT REPAIRS

To expedite service in a timely manner, we would like to have a predetermined dollar limit that you set for us so we can go ahead with the service/repairs. This set amount and below allows BTFD VS to go ahead with the repair without prior contact. This could be brake pads, fan belts maybe even tires, anything that might need replacement or repair while performing preventative maintenance. This means that BTFD VS has the authority to go ahead with repairs as needed, up to the preselected green light amount below.

TOB green light amount is not exceed, \$500.00 Initial please: _____

10. AFTER HOURS

Normal business hours for BTFD VS are from 7:30am till 5:30pm, Monday through Thursday. Closed Friday, Saturday & Sunday. BTFD VS can provide emergency after-hours service between the hours of 5pm until 7am. The rate for this service will be 1.5 times the applicable shop rate plus 1 additional hour. This rate will be in effect once the on-call technician has been called to respond. The emergency service call will need approval by senior staff prior to a BTFD VS Technician response.

11. INVOICING

Upon completion of the work order, a shop invoice is created. These invoices accumulate for the current month. At the end of the month, all invoices are sent to accounting and formal invoices are created along with the month’s statement. Once they are ready, they can be picked up at our headquarters station, mailed or emailed, just let us know. Invoice discrepancies can be reported to Mrs. Crystal DeRosia-Kaznowski for follow-up.

Billing Information.

Town of Bluffton
20 Bridge Street
Bluffton, SC 29910

Contact Information.

Felicia Roth
Director, Contracts and Compliance
843-706-7816
froth@townofbluffton.com

12. PAYMENT

The prior month’s statement balance is due net 30 days. Please mail all payments to:
Bluffton Township Fire District
Attn: Nancy Hyer, Financial Administrator
357 Fording Island Road, Bluffton, SC 29909

13. QUALITY ASSURANCE

BTFD Vehicle Services takes your business seriously. We welcome your feedback. We will maintain an open line of communication, so please feel free to call or stop by and discuss anything that is of concern to you.

14. AGREEMENT TERM

This agreement starts July 1st, 2024, and will remain valid through June 30th, 2025. If the agreement requires amending or a change in rates is required, it will be done at the time of the agreement renewal and TOB will be notified 90 days prior to agreement renewal.

15. CANCELLATION

This agreement may be terminated by either party, for any reason, upon providing 90-day written notice.

16. APPROVAL SIGNATURES

By signing below, you are in acceptance of the terms and conditions within this agreement.

B/C Steve McKinley
BTFD Vehicle Services

Date

Chief John P. Boulware
Bluffton Township Fire District

Date

Stephen Steese
Town Manager
Town of Bluffton

Date

Attachment 2

A RESOLUTION

RELATING TO THE TOWN OF BLUFFTON, SOUTH CAROLINA, SUPPORT OF A CONTRACT WITH BLUFFTON TOWNSHIP FIRE DISTRICT

NOW, THEREFORE, BE IT RESOLVED, by the Town Council (the “Council”), as the governing body of the Town of Bluffton, as follows:

1. The Council hereby declares that this Resolution shall constitute its consent to the contract with Bluffton Township Fire District for vehicle maintenance.

Approved this 11th day of June 2024.

Larry Toomer, Mayor

Town of Bluffton, South Carolina

ATTEST:

Marcia Hunter, Town Clerk

Town of Bluffton, South Carolina

SEAL

Attachment 3

Recommended Motion

Consideration to approve a resolution to execute a contract between the Town of Bluffton and Bluffton Township Fire District to for vehicle maintenance. – Felicia Roth, Director of Compliance and Contracts

“I make a motion to approve a resolution for execution of a contract between the Town of Bluffton and Bluffton Township Fire District for vehicle maintenance.”

TOWN COUNCIL

STAFF REPORT
Executive Department



MEETING DATE:	June 11, 2024
PROJECT:	Consideration of a Resolution Affirming Council’s Support of the Town of Bluffton’s Designation as a South Carolina Cultural Arts District and to Designate the Public Arts Committee as the Cultural Arts District Steering Committee.
PROJECT MANAGER:	Stephen Steese, Town Manager

REQUEST: Request for Town Council to approve the resolution affirming Council’s support for the SC Cultural Arts District designation and designating the Public Arts Committee as its official steering committee.

BACKGROUND:

The South Carolina (SC) General Assembly passed Act No. 232 of 2014 providing for the establishment of State-Designated Cultural Districts by the SC Arts Commission. In November of 2015, the Bluffton Town Council passed a resolution supporting the designation of the Town of Bluffton as a SC Cultural District.

In October of 2022, Town Council adopted a resolution approving the Town’s public art policy and the establishment of the Public Arts Committee to make recommendations on the implementation of public art within the Town of Bluffton.

In the summer of 2023, the Council appointed seven members to the Public Arts Committee. The committee began its monthly meetings in October of 2023. The current Chair, Pearce Scott and another board member, Bevan Bowler, were former members of the original Cultural District Steering Committee.

At the April 30, 2024, meeting of the Public Arts Committee, the Public Art Coordinator for the SC Arts Commission presented on the suggestion to designate the committee as the Cultural District Steering Committee. There was general informal support expressed by the committee for this designation with no objections expressed.

DISCUSSION:

The SC Arts Commission requires Cultural Districts to submit annual updates for a district to maintain its designation. The Cultural District Steering Committee had been an independent

committee of the Town of Bluffton but became inactive in FY 2024. The SC Arts Commission recommended the Town consider designating the Public Arts Committee as the Cultural District Steering Committee as is common in other jurisdictions.

NEXT STEPS: The Town Council may approve the resolution as submitted, approve with amendments, or deny approval of the ordinance.

ATTACHMENTS:

1. Resolution
2. Motion

RESOLUTION

A RESOLUTION AFFIRMING SUPPORT FOR THE TOWN OF BLUFFTON’S DESIGNATION AS
A STATE-DESIGNATED CULTURAL DISTRICT BY THE SOUTH CAROLINA ARTS
COMMISSION AND AUTHORIZING THE TOWN OF BLUFFTON’S PUBLIC ARTS COMMITTEE
TO SERVE AS THE CULTURAL DISTRICT STEERING COMMITTEE

WHEREAS, the Town of Bluffton, South Carolina (the “Town”) is an incorporated municipality located in Beaufort County, and as such possesses all powers granted to municipalities by the Constitution and general laws of the State of South Carolina; and

WHEREAS, pursuant to Section 5-5-10, Code of Laws of South Carolina 1976, as amended, the Town has selected the council-manager form of government and is governed by a council composed of a Mayor and six (6) council members which constitute the governing body of the Town (the “Town Council”); and

WHEREAS, the South Carolina General Assembly passed and the Governor signed into law Act No. 232 of 2014, providing for the establishment of State-Designated Cultural Districts by the South Carolina Arts Commission; and

WHEREAS, the entire one-square mile Old Town and the adjacent areas have been designated as a Cultural District since 2015; and

WHEREAS, the Town of Bluffton Town Council adopted the Bluffton Public Art Policy in October of 2022, establishing a seven-member committee to review and recommend the implementation of public art; and

WHEREAS, the designation of a Cultural District is in the best interest of the Town and thereby encourages collaboration from property and business owners within the District.

NOW, THEREFORE, BE IT RESOLVED by the Town Council of the Town as follows:

1. The Town Council hereby supports the continued designation of the South Carolina Cultural District in the Town of Bluffton.
2. The Town Council hereby authorizes the Town Public Arts Committee to serve in its capacity as the South Carolina Cultural District Steering Committee.

THIS RESOLUTION SHALL BECOME EFFECTIVE IMMEDIATELY UPON ADOPTION.
SIGNED, SEALED AND DELIVERED AS OF THIS ELEVENTH DAY OF JUNE, 2024.

Larry Toomer, Mayor
Town of Bluffton, South Carolina

ATTEST:

Marcia Hunter, Town Clerk
Town of Bluffton, South Carolina

SEAL

Attachment 2

Recommended Motion

Consideration to Approve a Resolution Affirming Support for the Town of Bluffton's Designation as a State-Designated Cultural District by the South Carolina Arts Commission and Authorizing the Town of Bluffton's Public Arts Committee to Serve as the Cultural District Steering Committee – Stephen Steese, Town Manager

“I make a motion to approve a resolution affirming support of the Town’s designation as a South Carolina Cultural District and authorize the Town Public Arts Committee to serve as the Cultural District Steering Committee.”