



## Regular Town Council Meeting

Tuesday, June 09, 2026 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 Sparklight Channel 9 and 417 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 05/12/2026
- [2.](#) Budget Workshop Minutes of 05/21/2026
- [3.](#) Budget Workshop Minutes of 05/28/2026

#### V. PRESENTATIONS, CELEBRATIONS, AND RECOGNITIONS

1. Beaufort County School District Character Student of the Month - Mayor Larry Toomer
2. Juneteenth Proclamation - Mayor Larry Toomer
3. Carolina Days Proclamation - Mayor Larry Toomer
- [4.](#) Update of Beaufort County Transportation Penny Tax Advisory Committee (TAC) - Lisa Sulka

#### VI. PUBLIC COMMENT

#### VII. COMMUNICATIONS FROM MAYOR AND COUNCIL

#### VIII. WORKSHOP AGENDA ITEMS

#### IX. PUBLIC HEARING & FINAL READING

- [1.](#) Consideration of an Ordinance Approving the Town of Bluffton Fiscal Year 2027 Proposed Consolidated Budget – Public Hearing & Final Reading – Stephen Steese, Town Manager

#### X. FORMAL AGENDA ITEMS

- [1.](#) Consideration of an Ordinance Authorizing an Economic Development Incentive Agreement between the Town of Bluffton and Sterling Corporation (d/b/a Sterling Helicopter) Second and Final Reading – Paul Arvantides, CEO, Don Ryan Center for Innovation

- [2.](#) Consideration of a Resolution to Install a 4-way Stop Sign at the Intersection of Boundary and Lawrence Streets – Stephen Steese, Town Manager
- [3.](#) Consideration of a Resolution Authorizing an Extension of the Validity Period for the Purchase and Sale of a Parcel of Real Property located in Bluffton, SC of Approximately 55.18 Acres Owned by Inland Bluffton, LLC - Stephen Steese, Town Manager
- [4.](#) Consideration of a Resolution to Establish an Entertainment Venue Exploratory Committee – Chris Forster, Assistant Town Manager
- [5.](#) Consideration of an Ordinance to Amend Town of Bluffton Code of Ordinances, Chapter 23 - Unified Development Ordinance, Article 5 - Design Standards, Sec. 5.10 (Stormwater); and Article 9 - Definitions and Interpretation, Sec. 9.2 (Defined Terms) - First Reading - Andrea Moreno, Watershed Division Manager
- [6.](#) Consideration of Accommodations Tax Advisory Committee Funding Recommendations for Quarter Ending March 31, 2026 - Shannon Milroy, Budget & Procurement Manager
  - Farmer's Market of Bluffton requesting a supplemental \$9,375 to assist with facility rental fees during the 2026 Market Season
  - Hilton Head Symphony Orchestra requesting \$46,818 for the 2026 Bluffton Concerts
  - Beaufort Water Search and Rescue requesting \$21,875 for the purchase of a replacement boat
  - Beaufort Water Search and Rescue requesting \$7,500 for a targeted FY2026 Tourism Safety Awareness & Marketing Campaign
  - Bluffton MKL Observance Committee requesting \$20,000 for the 11th Annual Juneteenth Festival
  - Historic Bluffton Foundation requesting \$50,000 for Heyward House Museum's FY2027 Operations
- [7.](#) Approval to Authorize a Construction Contract with Nix Construction Company, Inc. for New Riverside Barn Park Disc Golf Course (Fiscal Impact: \$229,385.03) - Pat Rooney, Capital Improvements Program Manager
- [8.](#) Consideration of a Resolution for Fiscal Year 2027 Annual Marketing Plan Presented by the Destination Marketing Organization - Ariana Pernice, Vice-President Visitor & Convention Bureau, Hilton Head Island-Bluffton Chamber of Commerce and Natalie Majorkiewicz, Director of Finance & Administration

#### **XI. 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 Emergency Procurement of HVAC System for the Law Enforcement Center (Fiscal Impact \$374,459.00) - Larry Beckler, Director of Public Resources
- [4.](#) Consideration of a Resolution Authorizing Acceptance of Amended Easement Donation from Beaufort County School District Necessary to Complete Portions of the Pritchard Street

Streetscape and Drainage Project - Kimberly Washok-Jones, Director of Projects and Watershed Resilience

5. Consideration of a Resolution Authorizing the Renewal of a Three-Party Intergovernmental Agreement for Indigent Defense Representation at the Town of Bluffton Municipal Court with the Law Office of Carol A. Miller and City of Beaufort - Lisa Cunningham, Clerk of Court
6. Consideration of Authorization for the Town Manager to Engage in Negotiations for a New Bluffton Municipal Court Prosecutor - Chief Joe Babkiewicz, Bluffton Police Department
7. Consideration of Memoranda of Agreement or IGA Annual Renewals - Chris Forster, Assistant Town Manager
  - Bluffton Township Fire District for Vehicle Maintenance
  - Beaufort County School District for School Resource Officers and Crossing Guards
  - South Carolina Department of Juvenile Justice for Detention Services

## XII. 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])

## XIII. ACTION FROM EXECUTIVE SESSION

## XIV. ADJOURNMENT

**NEXT MEETING DATE: TUESDAY, JULY 14, 2026**

*“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](mailto: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

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

May 12, 2026

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## 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 delivered Councilmember Burden.

## IV. ADOPTION OF THE MINUTES

### 1. Regular Meeting Minutes of 04/07/2026

A motion was made by Mayor Pro-tempore Hamilton and seconded by Councilmember Frazier to approve the Regular Meeting Minutes of 04/07/2026.

All were in favor and the motion passed.

### 2. Quarterly Workshop Meeting Minutes of 04/21/2026

A motion was made by Councilmember Wood and seconded by Councilmember Frazier to approve the Quarterly Workshop Meeting Minutes of 04/21/2026.

All were in favor and the motion passed.

## V. PRESENTATIONS, CELEBRATIONS, AND RECOGNITIONS

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

Mayor Larry Toomer, on behalf of Town Council, honored Red Cedar Elementary School 5<sup>th</sup>-grade student, Frankie Garay, for the character trait of self-control.

### 2. Stay Safe, Bluffton Scholarship Presentation - Mayor Larry Toomer

Mayor Larry Toomer, on behalf of Town Council, honored students Blake Burke - Cross Schools, Archer Dewig - John Paul II, Myla Greene - May River High School, Coleman Jacobi - May River High School, and Rebbecca Wohn - Bluffton High School with the Stay Safe, Bluffton Scholarship. Each Student received a \$1,500 scholarship check and a Stay Safe car bag with jumper cables and tire kits.

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

Mayor Larry Toomer, on behalf of Town Council, presented a National Mental Health Substance Use Prevention Month Proclamation to Teens for Healthy Youth members Avi Stevens and Victoria Da Armas.

### 4. Tuberos Sclerosis Complex Global Awareness Day Proclamation - Mayor Larry Toomer

Mayor Larry Toomer, on behalf of Town Council, presented a Tuberosus Sclerosis Complex Global Awareness Day Proclamation to Amy Bredeson.

5. Tourette Syndrome Awareness Month Proclamation - Mayor Larry Toomer

Mayor Larry Toomer, on behalf of Town Council, presented a Tourette Syndrome Awareness Month Proclamation to David Roth.

## VI. PUBLIC COMMENT

Andrew Kiehl - 22 Trail Ridge Retreat - Mr. Kiehl has requested placing a restriction on the proposed new Pulte Homes development located at New Riverside near Midpoint, prohibiting the use of Midpoint's model homes and sales center for marketing of the new development. He noted the increase of traffic on Midpoint Boulevard, which is the primary access road for the neighborhood.

Melissa Tullino - 142 Horizon Trail - Ms. Tullino asked the Town to pause the proposed Pulte Homes 104-home development due to current traffic congestion and pending impacts from other approved projects and new schools. Town staff offered to provide her with updates.

Theresa Cowart - 23 Pinecrest Way - Ms. Cowart expressed concerns about the development of the Pinecrest golf course, thanking council for their ongoing support against any development.

## VII. COMMUNICATIONS FROM MAYOR AND COUNCIL

Councilmember Frazier expressed her condolences to both Councilmember Burden and Heather Colin, Assistant Town Manager.

Councilmember Wood wished all mothers a Happy belated Mother's Day and thanked them for the care provided to loved ones.

Mayor Toomer, Mayor Pro-tempore Hamilton, Councilmember Burden expressed the same sentiments as previously mentioned and offered no additional communications.

## VIII. WORKSHOP AGENDA ITEMS

There were no Workshop Agenda Items to report.

## IX. PUBLIC HEARING & FINAL READING

There were no Public Hearing & Final Reading Items to report.

## X. FORMAL AGENDA ITEMS

1. Consideration of an Ordinance Approving the Town of Bluffton Fiscal Year 2027 Proposed Consolidated Budget – First Reading – Stephen Steese, Town Manager

A motion was made by Councilmember Frazier and seconded by Mayor Pro-tempore Hamilton approving the first reading of the Town of Bluffton Fiscal Year 2027 Proposed Consolidated Budget.

Town Council unanimously approved and the motion passed.

2. Consideration of Approval of an Initial Master Plan for New Riverside Parcel 8A Consisting of 104 Single-Family Lots on Approximately 100.69 Acres of Land Located on the Southwest

corner of the intersection of New Riverside Road and Myrtle Ford Road and Zoned New Riverside Planned Unit Development - Kevin Icard, Director of Growth Management

A motion was made by Councilmember Frazer and seconded by Mayor Toomer to approve the initial master plan for New Riverside Parcel 8A, consisting of 104 single-family lots on approximately 100.69 acres of land located on the southwest corner of the intersection of New Riverside Road and Myrtle Ford Road, and zoned New Riverside Planned Unit Development.

No final vote was taken by Council.

A second motion was made by Councilmember Frazer and seconded by Mayor Pro-tempore Hamilton to amend the aforementioned motion to increase the minimum on-street parking requirement from 20% to 25%.

The motion passed in a 4-1 vote of Town Council.

Voting Yea: Mayor Toomer, Mayor Pro-tempore Hamilton, Councilmember Wood, and Councilmember Frazier

Voting Nay: Councilmember Burden

3. Consideration of an Ordinance Authorizing an Economic Development Incentive Agreement between the Town of Bluffton and The Bluff Orthodontics, LLC - Second and Final Reading – David Nelems, Director of Special Projects, Don Ryan Center for Innovation

A motion was made by Councilmember Burden and seconded by Councilmember Wood to approve the second and final reading of an ordinance authorizing an Economic Development Incentive Agreement between the Town of Bluffton and The Bluff Orthodontics, LLC.

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

4. Consideration of an Ordinance Authorizing an Economic Development Incentive Agreement between the Town of Bluffton and Sterling Corporation (d/b/a Sterling Helicopter) First Reading – David Nelems, Director of Special Projects, Don Ryan Center for Innovation

A motion was made by Councilmember Burden and seconded by Mayor Pro-tempore Hamilton to approve the first reading of an ordinance authorizing an Economic Development Incentive agreement between the Town of Bluffton and Sterling Corporation (d/b/a Sterling Helicopter).

Town Council unanimously approved the first reading of this ordinance.

5. Approval to Authorize a Contract with Rummel, Klepper, Kahl, LLP (RK&K) to Develop a Town of Bluffton Resilience Plan (Fiscal Impact: \$358,604.00) - Beth Lewis, Watershed Resilience Manager

A motion was made by Councilmember Wood and seconded by Councilmember Frazier authorizing the Town Manager to enter into a contract with Rummel, Klepper, Kahl, LLP (RK&K) to Develop a Town of Bluffton Resilience Plan (Fiscal Impact: \$358,604.00).

Town Council unanimously approved and the motion passed.

6. Approval to Authorize a Contract with Beaufort Construction of SC, LLC for Construction of a Second Pavilion at Oscar Frazier Park Field of Dreams (Fiscal Impact: \$214,656.00) – Pat Rooney, Manager of Capital Improvements Program

A motion made by Mayor Pro-Tempore Hamilton and seconded by Councilmember Burden authorizing the Town Manager to enter into a contract with Beaufort Construction of SC, LLC for Construction of a Second Pavilion at Oscar Frazier Park Field of Dreams to include contingency amount reduced to 10% from 20%. (Fiscal Impact: \$196,768.00).

Town Council unanimously approved and the motion passed.

7. Authorization to Amend Contract #2025-53 for the New River Linear Trail Construction with Nix Construction to Accommodate Unforeseen Field Conditions (Fiscal Impact: \$320,000.00) - Pat Rooney, Capital Improvement Program Manager

A motion made by Mayor Pro-Tempore Hamilton and seconded by Councilmember Burden to authorize the Town Manager to amend contract #2025-53 for the New River Linear Trail Construction with Nix Construction to Accommodate Unforeseen Field Conditions (Fiscal Impact: \$320,000.00).

The motion passed in a 3-2 vote of Town Council.

Voting Yea: Mayor Toomer, Councilmember Wood, and Councilmember Frazier

Voting Nay: Mayor Pro-Tempore Hamilton and Councilmember Burden

8. Approval to Authorize a Contract with Mauldin & Jenkins for Financial Audit Services beginning on July 1, 2026 for Fiscal Years 2026 through Fiscal Year 2028 (Fiscal Impact: \$104,700) – Natalie Majorkiewicz, Director of Finance & Administration

A motion was made by Councilmember Frazier and seconded by Pro-tempore Hamilton to authorize the Town Manager to enter into a contract with Mauldin & Jenkins for Financial Audit Services beginning on July 1, 2026, for Fiscal Years 2026 through Fiscal Year 2028 (Fiscal Impact: \$104,700).

Town Council unanimously approved and the motion passed.

## **XI. CONSENT AGENDA ITEMS**

A motion was made by Councilmember Wood and seconded by Councilmember Frazier to accept the Consent Agenda as submitted.

Town Council unanimously agreed to the motion to accept as submitted.

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. Kids to Parks Day Proclamation - Mayor Larry Toomer
4. Building Safety Month Proclamation - Mayor Larry Toomer
5. Public Service Employee Recognition Week Proclamation - Mayor Larry Toomer

6. Historic Preservation Month Proclamation - Mayor Larry Toomer
7. Lupus Awareness Month Proclamation - Mayor Larry Toomer
8. Municipal Clerks Week Proclamation - Mayor Larry Toomer
9. Consideration of a Resolution Authorizing Approval of a Memorandum of Understanding with the University of South Carolina Beaufort for Microbial Source Tracking Laboratory Services - Beth Lewis, Watershed Resilience Manager
10. Consideration of Storm Drain Art Designs Created by Local Students and Funded by the Beautification Committee (Fiscal Impact: \$600.00) - Andrea Moreno, Watershed Management Division Manager and Larry Beckler, Public Services Director
11. Consideration of a Resolution Approving the Town of Bluffton Assessment District Roll for Tax Year 2026 - Stephen Steese, Town Manager
12. Consideration of a Resolution Authorizing Approval of a Comprehensive Safety Program, Loss Control Policy, and Establishment of an Administrative Committee - Anni Evans, Director of Human Resources
13. Approval of Public Arts Committee Recommendations for Student Art for Welcome Center Display - Chris Forster, Assistant Town Manager

## **XII. EXECUTIVE SESSION**

1. Discussion Relating to Proposed Contractual Matters Regarding Lease Agreements for Town Owned Property at 97 Progressive Street (Pursuant to SC Freedom of Information Act 30-4-70 [a][2])
2. Personnel Matters Relating to Town Manager Annual Review (Pursuant to SC Freedom of Information Act 30-4-70[a][1])

## **XIII. ACTION FROM EXECUTIVE SESSION**

1. Discussion Relating to Proposed Contractual Matters Regarding Lease Agreements for Town Owned Property at 97 Progressive Street (Pursuant to SC Freedom of Information Act 30-4-70 [a][2])

A motion was made by Councilmember Burden and seconded by Mayor Pro-tempore Hamilton to authorize the CEO of Don Ryan Center of Innovation to negotiate and enter into a lease agreement at 97 Progressive Street, Bluffton, SC, with the Beaufort County Economic Development Corporation, the Hispanic Business Association, the Greater Bluffton Chamber of Commerce, Wellmphatics2, LLC, and KWG Create, LLC provided the terms and conditions are substantively consistent with what was provided to Council for review and Consideration.

Town council unanimously agreed and the motion passed.

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

A motion was made by Councilmember Wood and seconded by Mayor Pro-tempore Hamilton to increase the Town Manager's salary, 5%, to \$201,600.00, effective the next pay period.

Town council unanimously agreed and the motion passed.

**14. ADJOURNMENT**

No motions were taken and the meeting was adjourned at 8:58 PM.

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Marcia Hunter, Town Clerk  
Town of Bluffton, South Carolina

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Larry C. Toomer, Mayor  
Town of Bluffton, South Carolina

DRAFT

# Budget Workshop Meeting

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

May 21, 2026

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## I. CALL TO ORDER

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

Absent from the meeting:

Councilmember Bridgette Frazier and Councilmember Emily Burden

## II. PUBLIC COMMENT

No Public Comment

## III. WORKSHOP ITEMS:

### 1. General Fund

General Fund Topics:

Staff reviewed the Town of Bluffton Economic Factors, FY27 Budget Goals, FY27 Proposed Budget Overview, and FY27 Budget Review & Approval Process

### 2. Special Revenue Funds

Special Revenue Funds topics:

Staff reviewed the Hospitality Tax Fund and Local Accommodations Tax Fund

### 3. Stormwater Fund

Stormwater Fund Topics:

Staff reviewed the Regional Stormwater Utility Fee Comparison, FY27 Proposed Stormwater Fund Budget Revenues, and FY27 Proposed Stormwater Fund Budget Expenditures

### 4. Debt Services Fund

Debt Services Fund topics:

Staff reviewed the Legal Debt Margin Calculations as a Percentage of Debt Limit, FY27 Debt Services Fund Highlights - General Obligation Bonds, FY27 Debt Services Fund Highlights - TIF Special Revenue Bonds, FY27 Debt Services Fund Budget Revenues, FY27 Debt Services Fund Budget Expenditures, Funds Balance, FY27 Proposed Consolidated Budget

### 5. Lowcountry Regional Transportation Authority – Mary Lou Franzoni, Executive Director

Mary Lou Franzoni, Executive Director, returned at the request of Council to follow up with previously requested information regarding the annual Lowcountry Regional Transport Authority presentation and the midyear review.

**IV. ADJOURNMENT**

The workshop adjourned at 6:48 PM.

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Marcia Hunter, Town Clerk  
Town of Bluffton, South Carolina

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Larry C. Toomer, Mayor  
Town of Bluffton, South Carolina

DRAFT

# Budget Workshop Meeting

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

May 28, 2026

## I. CALL TO ORDER

Mayor Pro-tempore Hamilton called the meeting to order at 5:00 PM.

Mayor Toomer and Councilmember Burden were absent from the meeting.

## II. CALL TO ORDER

No Public Comment

## III. WORKSHOP ITEMS:

### 1. Discussion of Carryover Items of May 21, 2026 Budget Workshop Meeting

Stephen Steese, Town Manager, provided the recap & updates from the FY27 Consolidated Budget First Reading and First Budget Workshop meeting.

Each of the following topics were discussed:

- Shuttle Services for Events

Events approved for State Accommodations Tax funds that request support by Town of Bluffton Police Department are funded by Transfers into Local Accommodations Taxes

- \$30,000 Beaufort Marine Search & Rescue

- Properties Not Hooked to Sewer

Staff estimates of approximately 50-75 septic systems remaining in Historic District, Buck Island and Simmonsville Road neighborhoods following Town Sewer Extension/Connection Projects. Staff are again requesting BJWSA's assistance with their updated billing information.

- Additional SRO Positions in the school area are currently being evaluated with Dr. Frank Rodriguez, Superintendent of the Beaufort County School District and Joe Babkiewicz, Bluffton Police Chief.

### 2. Capital Improvement Program Fund

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

FY27 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 5:45 PM.

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Marcia Hunter, Town Clerk

Town of Bluffton, South Carolina

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Larry C. Toomer, Mayor

Town of Bluffton, South Carolina

DRAFT

# Memorandum To County Council Regarding 2026 Transportation Sales Tax Advisory Committee Recommendations

*Final Recommendation Memorandum for Beaufort County Council Consideration*

**To:** Chairman and Members, Beaufort County Council  
**From:** Lisa Sulka, Chairwoman, Transportation Advisory Committee  
**Copy to:** Members of the Transportation Advisory; Mike Moore, County Administrator; Jared Fralix PE, Assistant County Administrator; Bryan Bauer PE, Engineering Director; Sarah Brock, Clerk to Council  
**Subject:** Transportation Advisory Committee Report and Recommendations for Proposed 2026 Transportation Sales Tax Referendum  
**Date:** May 6, 2026

## Purpose

The purpose of this memorandum is to transmit the recommendations of the Transportation Advisory Committee regarding a proposed 2026 Transportation Sales Tax referendum for Beaufort County Council’s review, consideration, modification, and potential adoption.

County Council established the Transportation Advisory Committee by Resolution 2025/70 to provide recommendations regarding a possible 2026 Transportation Sales Tax referendum, including the proposed project list, the amount of sales tax to be collected, and the duration of the collection period.

The resolution further directed that the proposed projects should primarily focus on road widenings, intersection improvements, resurfacing, and paving projects that enhance safety, mobility, and connectivity across Beaufort County.

## Executive Summary

The Transportation Advisory Committee recommends that County Council **move forward with a 2026 Transportation Sales Tax referendum** structured around an **eight-year (8)** collection period with an estimated program value of approximately **\$780 million**.

The recommended program is intended to address Beaufort County’s most pressing transportation infrastructure needs through three major project categories:

- Widening Projects
- Resurfacing And Dirt Road Paving Projects
- Safety And Intersection Improvement Projects

The Committee’s work focused on building a balanced countywide program that addresses capacity, safety, pavement condition, connectivity, and long-term mobility needs across municipal, unincorporated, rural, suburban, and island communities.

**Executive Takeaway:** The recommended program is designed to be focused, understandable, and implementable by organizing projects into clear categories tied directly to public safety, road capacity, and pavement condition.

## Council’s Charge of the Committee

Beaufort County Council established the Transportation Advisory Committee to provide citizen-led recommendations for a potential 2026 Transportation Sales Tax referendum. The Committee was charged with reviewing transportation needs, considering potential projects, evaluating the proposed tax amount and duration, and submitting recommendations to County Council.

The resolution established a 15-member committee consisting of one appointee from each of the eleven (11) County Council districts and one (1) appointee from each of the four (4) municipalities within Beaufort County: the City of Beaufort, Town of Port Royal, Town of Bluffton, and Town of Hilton Head Island.

### Committee Membership and Officers

The Transportation Advisory Committee included the following members:

Member	Appointing Area	Role
Joseph Kline	District 1	Member
Paul Trask	District 2	Member
Anthony Jones	District 3	Member
Elizabeth Penn-Sanders	District 4	Member
Jerry Reeves	District 5	Member
Craig Forrest	District 6	Member
Bill Rickett	District 7	Member
Joy Coe	District 8	Secretary
Matt Harden	District 9	Member
Charles Perry	District 10	Member
Jennifer Ericksen	District 11	Member
Grady Woods	City of Beaufort	Member
Gary Freeman	Town of Port Royal	Member
Lisa Sulka	Town of Bluffton	Chairwoman
Glenn Stanford	Town of Hilton Head Island	Vice Chairman

At the Committee’s first meeting, Lisa Sulka was elected Chairwoman and Glenn Stanford was elected Vice Chairman. The first meeting agenda also identified County Administrator Mike Moore, Assistant County Administrator Jared Fralix, Engineering Director Bryan Bauer as staff resources supporting the Committee’s work.

### Committee Process

The Committee convened its first meeting on February 4, 2026, in County Council Chambers. The initial meeting included welcome and introductions, a review of duties and responsibilities, a history of the sales tax program, appointment of officers, review of the future meeting schedule, and open discussion.

The Committee’s schedule included a total of nine (9) meetings throughout the County that were a combination of working meetings, municipal meetings, and community meetings. Meetings were designed to allow the Committee to receive information from County staff, hear from municipal partners, consider public input, and evaluate transportation priorities across the County.

**Key Insight:** The Committee process was structured to balance technical review, municipal coordination, citizen representation, and public input before presenting a final recommendation to County Council.

### Recommended Program Framework

The Committee recommends a proposed **eight-year Transportation Sales Tax program** with an estimated value of approximately **\$780 million**.

The proposed program is organized into three primary project categories. The project category totals below reflect the current planning framework and are intended to support a program that also accounts for appropriate contingencies, escalation, implementation costs, and project risk over the eight-year collection period.

Project Category	Planning Allocation
Safety And Intersection Improvement Projects	\$326 million

Project Category	Planning Allocation
Widening Projects	\$205 million
Resurfacing And Dirt Road Paving Projects	\$249 million

The Committee recognizes that transportation project costs are subject to change based on design development, right-of-way needs, permitting, inflation, utility coordination, construction market conditions, and coordination with state and federal partners. For that reason, the proposed program is intended to include appropriate contingencies and risk factors over the eight-year collection period.

The Committee further recognizes that the recommended list represents a planning-level program and not final engineered construction budgets. Individual projects will require further development, scope confirmation, cost refinement, public engagement, and coordination with applicable jurisdictions and agencies before implementation.

### Recommended Safety and Intersection Improvement Projects

The Committee recommends approximately \$326 million for safety and intersection improvement projects.

Project	Allocation	Description
Ribaut Rd/ Lady's Island Dr- Turn Lane Construction	\$4,800,000	See attached
Traffic Signal Improvements	\$19,075,000	See attached
SC 170/US 278 Diverging Diamond Interchange	\$18,054,000	See attached
Squire Pope/William Hilton Pkwy Improvements	\$14,400,000	See attached
Lady's Island Dr/Meridian Rd Improvements	\$8,164,000	See attached
US 21 Improvements at Chowan Creek	\$3,850,000	See attached
SC 170/SC 46 Intersection Conversion	\$10,237,000	See attached
SC 462 Realignment	\$19,760,000	See attached
SC 170 Corridor Improvements N.O.B.	\$6,200,000	See attached
Spanish Wells/William Hilton Pkwy Improvements	\$39,700,000	See attached
Savannah Hwy & SC 170 Improvements	\$1,020,000	See attached
Warsaw Island Rd	\$4,550,000	See attached
Bluffton Pkwy/SC46 Roundabout Improvements	\$6,000,000	See attached
US 278/Sun City Signal Improvements	\$2,623,000	See attached
US 278 & Buck Island Rd	\$1,800,000	See attached
Ribaut Rd/Depot Rd Intersection	\$3,750,000	See attached
Gumtree Rd Improvements	\$15,600,000	See attached
US 278 & Simonsville Rd	\$2,220,000	See attached
Bluffton Pkwy Improvements	\$7,130,000	See attached
Gateway to Port Royal (Ribaut Rd)	\$19,360,000	See attached
Gibbet Rd Signal	\$4,075,000	See attached
Grober Hill Rd/Parris Island Gtwy Intersection	\$1,190,000	See attached
High Visibility Crosswalks & RRFBs (Downtown Beaufort)	\$2,873,000	See attached
Short's Landing Signal	\$1,320,000	See attached
Sea Pines Circle	\$15,600,000	See attached
Evans Way/SC 170- Signalized RCI	\$7,878,000	See attached
RI/RO at Bluffton Pkwy/Goethe Rd	\$1,220,000	See attached

Project	Allocation	Description
Median Closings US 278	\$1,345,000	See attached
Old Jericho Rd Bridge Replacement	\$1,710,000	See attached
Goethe Rd Resurfacing/Traffic Calming	\$420,000	See attached
Main Street Road Improvements	\$9,500,000	See attached
Grober Hill Rd Corridor Improvements	\$8,310,000	See attached
William Hilton Pkwy- Chaplin Corridor	\$9,100,000	See attached
Stardust Ln Signal	\$811,000	See attached
Buckwalter Pkwy (HE McCracken Cir Section)	\$4,340,000	See attached
Joe Frazier Rd Roundabout	\$4,642,000	See attached
Laurel Bay/Joe Frazier Roundabout	\$5,326,000	See attached
Laurel Bay/Bay Pines Roundabout	\$4,331,000	See attached
Shanklin Rd RCI	\$690,000	See attached
Roseida Rd RCI	\$850,000	See attached
ITS Downtown Bridge Design/Construction	\$690,000	See attached
Middle Rd/SC 802 Roundabout Improvements	\$1,860,000	See attached
Guardrail on Middle Rd (B/W Doe Rd & Buck Rd)	\$140,000	See attached
Ribaut Rd/ Lady's Island Dr- Turn Lane Construction	\$4,800,000	See attached
Traffic Signal Improvements	\$19,075,000	See attached

Improvements include turn lanes, signal improvements, roundabouts, pedestrian accommodations, access management, striping, sight-distance improvements, operational upgrades, and other targeted safety enhancements.

The Committee recommends that this category remain focused on projects that improve safety, reduce congestion, enhance traffic flow, and provide measurable benefits to motorists, pedestrians, cyclists, emergency responders, and transit users.

### Recommended Widening Projects

The Committee recommends approximately \$205 million for road widening projects. These projects are intended to address major capacity and mobility needs in high-growth corridors and areas experiencing significant transportation demand.

Project	Allocation	Description
SC 170	\$103,840,000	From US 278 to SC 462, including HDR-25.
SC 46	\$44,170,000	From the SC 170 roundabout to the Jasper County line.
US 278	\$51,984,000	From SC 170 to the Jasper County line.
Neil Rd Intersection Improvements	\$4,650,000	New signalized intersection at Neil Rd and Robert Smalls Pkwy

These widening projects reflect the Committee’s desire to focus major capacity investments on corridors that serve regional movement, commuter traffic, residential growth, commercial development, and long-term mobility needs.

### Recommended Resurfacing and Dirt Road Paving Projects

The Committee recommends approximately \$249 million for resurfacing and dirt road paving projects. This category is intended to improve pavement conditions, extend the life of existing infrastructure, address long-standing dirt road paving needs, and support a more reliable countywide transportation network.

Project	Allocation	Description
Dirt Road Paving	\$12,381,521	18 County dirt roads with available right-of-way. See attached.
Municipal Roads – City of Beaufort	\$6,721,000	City of Beaufort-owned paved streets. See attached.
Municipal Roads – Town of Port Royal	\$1,034,000	Town of Port Royal-owned paved streets. See attached.
Municipal Roads – Town of HHI	\$8,272,000	Town of HHI-owned paved streets. See attached.
Municipal Roads – Town of Bluffton	\$3,877,500	Town of Bluffton-owned paved streets. See attached.
Daufuskie Island Roads	\$7,619,437	5 County-owned paved roads on Daufuskie Island. See attached.
Trask Parkway (US 17)	\$12,542,000	From the Jasper County line to US 21 at Garden’s Corner.
Trask Parkway (US 21)	\$46,708,500	From US 17 at Garden’s Corner to Wood’s Memorial Bridge, Lady’s Island Dr, and Ribaut Rd (Port Royal section)
Sea Island Parkway (US 21)	\$11,700,000	From the Lady’s Island Walmart area to the Harbor Island Bridge.
Sams Point Road (SC 802)	\$5,319,300	From Sea Island Parkway to the roundabout.
Parris Island Gateway (US 21)	\$12,292,500	Trask Pkwy to Bell Bridge
Savannah Hwy (SC 128)	\$4,867,200	From SC 170 to Parris Island Gateway.
Robert Smalls Parkway (SC 170)	\$42,073,200	From Boundary Street to SC 462 and from US 278 to SC 46 at the roundabout.
Buckwalter Parkway	\$10,099,700	From US 278 to SC 46.
Bluffton Parkway	\$14,661,600	From SC 170 to Buck Island Road and from Red Cedar Rd to the US 278 flyover bridge.
Fording Island Road (US 278)	\$27,096,400	From SC 170 to the Hilton Head Island bridge.
William Hilton Parkway (US 278 Business)	\$21,294,000	From the Hilton Head Island bridge to Sea Pines Circle.

The resurfacing and dirt road paving category is particularly important because it provides visible and practical benefits across the County. These projects are intended to improve daily travel conditions, reduce long-term maintenance costs, support public safety, and help ensure that existing infrastructure is preserved while new capacity projects are advanced.

**Key Insight:** The safety and intersection category provides flexibility to address high-impact operational improvements that may not require the same level of investment as major widening projects but can significantly improve daily mobility and public safety.

## Program Implementation Considerations

The Committee recommends that County Council consider the following implementation principles as the program advances:

### Establish An Oversight Committee to Maintain Transparency

County Council should establish an oversight committee to meet regularly, monitor project progress, and provide ongoing program oversight. These meetings should be open to the public and include an opportunity for public comment. The program should be organized around clear project categories, published project lists, regular progress reporting, and transparent financial tracking.

### Consider Bonding to Expedite Delivery

The County should consider bonding for the Sales Tax Program to expedite project delivery where financially prudent and operationally beneficial.

### Provide Municipal Project Management Opportunities

If feasible municipalities should be given the opportunity to manage projects located within their respective jurisdictions when those projects were submitted or endorsed by the municipal governing body.

If a municipality elects to manage a project, the responsibilities of the County and the municipality should be governed through an intergovernmental agreement structured as a grantor/grantee relationship. The municipality should be required to provide regular progress updates, submit supporting documentation, and present project updates to the established oversight committee.

### Use Enhanced Striping on Primary Routes

Six-inch line striping should be utilized on sales tax-funded projects located on primary routes to improve visibility, safety, and consistency across major corridors.

### Incorporate Complete Streets Principles

Widening projects along the SC 46 and SC 170 corridors should include pedestrian accommodations consistent with Beaufort County's Bicycle and Pedestrian Master Plan. At a minimum, these projects should include multiuse pathways where feasible.

### Pursue Matching Funds Where Available

The County should actively pursue state and federal funding opportunities to leverage local sales tax dollars and accelerate implementation where feasible.

### Preserve Flexibility for Final Project Development

Because many projects are currently at a planning level, the County should preserve the ability to refine scopes, adjust estimates, coordinate with other agencies, and respond to changing conditions while remaining consistent with the referendum language and approved program intent.

### Coordinate With Municipal and State Partners

Many recommended projects involve municipal roads, state-maintained roads, or corridors with regional significance. Successful delivery will require continued coordination with municipalities, SCDOT, LATS, Jasper County, and other partner agencies.

**Executive Takeaway:** The success of the proposed program will depend not only on the referendum itself, but also on disciplined project management, transparent reporting, intergovernmental coordination, and clear public communication.

## Conclusion

The Transportation Advisory Committee appreciates the opportunity to serve County Council and the citizens of Beaufort County in reviewing transportation needs and developing recommendations for a proposed 2026 Transportation Sales Tax referendum.

The Committee believes the recommended program provides a focused, practical, and countywide approach to addressing Beaufort County’s transportation infrastructure needs. The proposed program balances major widening projects, resurfacing and dirt road paving, and safety and intersection improvements in a manner intended to improve mobility, preserve existing infrastructure, and enhance public safety.

The Committee respectfully submits this recommendation to County Council for review, consideration, modification, and potential adoption.

Respectfully Submitted,

Transportation Advisory Committee

**Signature Page**

By signing below, each member of the Transportation Advisory Committee acknowledges the submission of this memorandum and the Committee’s recommendations to Beaufort County Council.

**Lisa Sulka**

Chairwoman, Town of Bluffton

Signature:

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**Glenn Stanford**

Vice Chairman, Town of HHI

Signature:

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**Joy Coe**

Secretary, District 8

Signature:

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**Joseph Kline**

District 1

Signature:

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**Paul Trask**

District 2

Signature:

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**Anthony Jones**

District 3

Signature:

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**Elizabeth Penn-Sanders**

District 4

Signature:

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**Jerry Reeves**

District 5

Signature:

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**Craig Forrest**

District 6

Signature:

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**Bill Rickett**

District 7

Signature:

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**Matt Harden**

District 9

Signature:

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**Charles Perry**

District 10

Signature:

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**Jennifer Ericksen**

District 11

Signature:

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**Grady Woods**

City of Beaufort

Signature:

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**Gary Freeman**

Town of Port Royal

Signature:

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## Intersection and Safety Projects

**Ribaut Road – Lady’s Island Drive Turn Lanes – Installation of free-flow right turn lanes Eastbound and Westbound**

**Traffic Signal Improvements** - Improvements to the Beaufort County traffic signal network including the evaluation, design, and implementation of an adaptive signal network on recommended corridors from Kimley-Horn memo dated April 6, 2026 including Bluffton Parkway, Buckwalter Parkway, US 278 (Argent Boulevard to Moss Creek Dr), Boundary St (SC 170 to Ribaut Road), and Ribaut Road (Boundary Street to Lady’s Island Dr). A traffic signal asset evaluation will be performed to identify the infrastructure and condition of signal assets throughout the County and recommend improvements recommendations. Improvements may include signal retiming and hardware replacement (cabinet, controller, wiring, signal heads, back plates, or detection). Detection upgrades to radar or camera detection may also be included.

**Squire Pope/William Hilton Pkwy Improvements –** This project aims to improve traffic flow and reduce congestion at this Island Gateway Corridor intersection while enhancing safety for all travel modes. It restructures lanes and reduces conflict points to create safer, more predictable operations.

**SC 170/US 278 Diverging Diamond Interchange** - Construct a Diverging Diamond Interchange (DDI) below existing US 278. Provide dual lefts along SC 170 onto US 278 eastbound and widen the on-ramp as needed. Construct dual westbound left-turn lanes from US 278 Westbound Off Ramp onto SC 170. Construct dual westbound right-turn lanes from the US 278 Westbound Off-ramp onto SC 170. Construct a westbound right-turn slip lane onto SC 170 northbound that will continue into the right-turn lane at Commerce Place West / Commerce Place East.

**Ribaut Road Corridor Improvement (City of Beaufort)** - Corridor improvement on 4-lane section of Ribaut Road from Boundary Street to Lady’s Island Drive including intersection improvements at the intersection of Ribaut Road and Boundary Street, pedestrian accommodations, and resurfacing the entire corridor.

**Lady’s Island Drive/Meridian Rd Improvements** - Realign and convert two stop-controlled T-intersections along Lady’s Island Drive into a dual-lane peanut roundabout approximately 500 feet long from Islands Causeway to Meridian Road. Widen roadway for channelization and relocation of existing through lanes and pedestrian accommodations for the peanut roundabout. Construct new pedestrian facilities on the southbound approach.

**US 21 Improvements at Chowan Creek** -Improvement on a 3-lane section of US 21 at Chowan Creek from 750 feet south of Chowan Creek Bluff to 500 feet north of Warsaw Island Road. Project identified in the 2025 Beaufort County Roadway Vulnerability Study-Phase 1 by HDR.

**Warsaw Island Road Causeway Improvement**- Improvements to raise grade to avoid flooding. Project identified in the 2025 Beaufort County Roadway Vulnerability Study-Phase 1 by HDR.

**SC 170/SC 46 Intersection Conversion** - Convert existing roundabout to a traffic signal with pedestrian accommodations. Construct dual left turn lanes for eastbound, westbound, and northbound approaches. Remove existing channelized right turns for eastbound, westbound, and southbound movements.

**Bluffton Parkway/SC46 Roundabout Improvements** - Convert the existing 2x2 roundabout to a 2x1 roundabout with appropriate right-turn bypass lanes as shown in the Concept Designs by Mead and Hunt, 2024 LCOG Safety Action Plan and 2025 LATS Bluffton Parkway Corridor Study.

**Spanish Wells/William Hilton Pkwy Improvements** – The project will upgrade this major Island Gateway Corridor intersection to improve mobility, reduce delays, and strengthen connections to nearby neighborhoods, schools, and commercial areas. Safety is enhanced through reduced conflict points and improved visibility.

**Savannah Hwy & SC 170 Improvements** - Construct raised medians at SC 170 and Savannah Highway to prohibit left-turn movements from the Circle K driveways as shown on 2024 LCOG Safety Action Plan.

**SC 462 Realignment** - Relocate SC 462 eastward from BJWSA Canal to SC 170 to better align the intersection and remove from curve tangent along SC 170 as depicted in 2024 Realignment Concept by Kimley Horn and SC 170 Corridor Access Study Final Report by AECOM. Project includes new intersection at SC 170 and new roundabout at intersection with SC 46.

**SC 170 Corridor Improvements from Edgar C Glenn Boat Landing to Boundary Street**- Corridor improvements shown on the 2024 LCOG Safety Action Plan including extending the existing raised medians between Boundary Street and Neil Road and also between Burton Hill Road and Old Jerico Road to include Lowes, converting Shadow Moss Dr to ¾ access intersection, addition of raised medians at Edgar C Glenn boat ramp, upgrading existing signals along the corridor, and addition of new signal at Broad River Road.

**B.E. Wheatley Drive/SC 170 Traffic Signal** – Mast arm intersection.

**US 278/Sun City Signal Improvements** - Remove channelization for right turns from both Sun City Blvd approaches onto US 278. Reconfigure eastbound and westbound left-turn lanes with an increased positive offset to improve sight distance on US 278. Install nearside signal heads on both US 278 approaches. Implement westbound left-turn protected-only signal phasing on US 278. Offset left-turn lanes on Sun City approaches to improve site distance.

**US 278/Buck Island Road Intersection Improvements** - Pedestrian Intersection Improvement Project to include Rephasing, timing and line arrangements. Modify Buck Island Rd for 2 north-bound left turns, one thru and one right.

**Ribaut Road/Depot Road Intersection** - Construct intersection improvement/roundabout at intersection of Ribaut Road and Depot Road. Remove or improve existing signal.

**Gumtree Road Improvements** – This corridor project focuses on improving safety and functionality through upgraded intersections, improved pathways, and better pedestrian and bicycle accommodations. It aims to enhance school access and neighborhood connectivity.

**US 278/Simmons ville Road Intersection Improvements** - Intersection Improvement Project to include Rephasing, timing and line arrangements. Modify Simmons ville Rd for 2 northbound left turns, one thru and one right.

**Bluffton Parkway Improvements** - Bluffton Parkway 0–5-year Q2 & Q3 improvements from LATS Corridor Study.

- Q2 (Buckwalter Pkwy & Bluffton Pkwy from Buckwalter Pkwy to Buck Island Rd) improvements– Signal warrant and timing review along the corridor, rumble strips along Buckwalter Parkway, RIRO at Pinecrest Drive, mid-block ped crossing with beacon at Cross School Entrance.
- Q3 (Bluffton Pkwy from Buck Island Rd to Burnt Church Road) Improvements - Signal warrant and timing review along the corridor, improve signing at Bluffton road Roundabout, RIRO at Goethe Road, Intersection modifications at Buck Island, Simmons ville and Burnt Church; Access management at Bluffton Park, Crescent and Persimmon.

**Gateway to Port Royal (Ribaut Road)** - Access management and pathway improvements on Ribaut Road from Paris Island Gateway to Lady’s Island Drive. Includes median islands, a new shared use pathway, and local road connections.

**Gibbett Road Signal** - Install a Traffic Signal with pedestrian accommodations. Widen the roadway for the construction of a new eastbound left-turn lane onto Gibbet Road, a westbound left-turn lane onto Pritchard Farms Road, a westbound right-turn lane onto

Gibbet Road, and a southbound right turn lane onto SC 46. Install new stop bar pavement markings.

**Grober Hill Road/Parris Island Gateway Intersection Improvements** - Addition of traffic signal at intersection of Grober Hill Road and Parris Island Gateway.

**High Visibility Crosswalks & RRFBs (Downtown Beaufort)** - Upgrade existing unsignalized pedestrian crossings at the intersections of US 21 Business/Boundary Street/Carteret Street with Port Republic Street, North Street, King Street, Prince Street, Duke Street, Washington Street, Congress Street, and Church Street and the intersections of Bay Street with Newcastle Street, West Street, and Scott Street (11 total crossings) to include high-visibility markings, W11-2 signage, and Rectangular Rapid Flashing Beacons (RRFB), as appropriate.

**Short's Landing Signal** - Addition of traffic signal at intersection of Shorts Landing Road and Sams Point Road as depicted in Stantec Shorts Landing Road Concept, if approved by SCDOT.

**Sea Pines Circle** – Sea Pines Circle improvements aim to reduce congestion at the major roundabout while enhancing multimodal safety and improving travel reliability for residents and visitors. The project includes measures to reduce conflict points and improve visibility.

**Evans Way/SC 170 Signalized Reduced Conflict Intersection (RCI)** - Construct a signalized reduced conflict intersection with pedestrian accommodations. Construct northbound and southbound, unsignalized U-Turn lanes along SC 170. Modify the westbound and eastbound approaches to accommodate dual right-turn lanes onto SC 170.

**RI/RO at Bluffton Pkwy/Goethe Rd** - Close median access on Bluffton Parkway at Goethe Road to eliminate all left turn movements to and from Goethe Road onto and off of Bluffton Parkway, as shown on 2024 LCOG Safety Action Plan and 2025 LATS Bluffton Parkway Corridor Study.

**Median Closings US 278** - Close the median at the following 5 intersections along US 278: Lost Oaks Drive, Eagle Pointe Drive, Pinckney Colony Road, McDonald's/Circle K Driveway, and Parmenter Road to provide 3/4 access. Realign and restripe side streets to provide right turns only as needed.

**Old Jericho Rd Bridge Replacement** - Replace bridge on Old Jericho Road about ¼ mile south of SC 170. Include sidewalks on both sides for future development.

**Goethe Rd Resurfacing/Traffic Calming** - Corridor improvement on Goethe Road from May River Road to Hilderbrand Road as depicted in the Proposed Plans for

Goethe Road Improvements by Consor. Includes resurfacing and addition of curb and gutter, catch basins, and sidewalk.

**Main Street Road Improvements** – The project enhances a parallel corridor to William Hilton Parkway to help reduce congestion, improve traffic flow, and create safer travel for drivers, pedestrians, and cyclists. It includes safety-focused lane and visibility improvements.

**Grober Hill Rd Corridor Improvements** - Corridor improvement on 3-lane section of Grober Hill Road from Castle Rock Road to Parris Island Gateway. Construct dual lefts from Parris Island Gateway to Grober Hill Road and from Grober Hill Road onto Parris Island Gateway. Includes intersection geometry improvements to bring geometry closer to ninety degrees. Pavement will be placed for future dual lefts.

**William Hilton Pkwy- Chaplin Corridor** – This project improves traffic flow and safety along a key portion of William Hilton Parkway by reconfiguring lanes and reducing conflict points. It supports mobility for residents, businesses, and visitors.

**Stardust Lane Traffic Signal** - Install a Traffic Signal with pedestrian accommodations. At intersection of Stardust Lane and SC 46.

**Buckwalter Pkwy (HE McCracken Cir Section)** - Improvements near school complex to include traffic signal at intersection with HE McCracken North to include U- turn for buses. HE McCracken North to include access to Buckwalter Recreation Center. Close median at existing access to Buckwalter Recreation Center. Limit left turn egress at Buckwalter Recreation Center and HE McCracken Middle School. Include U-turn for buses at intersection with HE McCracken South.

**Joe Frazier Road Roundabout-** Construct a new single-lane roundabout between Joe Frazier Road and Middleton Recreation Drive. Construct new connector roads to connect Joe Frazier Road with Middleton Recreation Drive and future connection to Habersham Road. Widen roadway for channelization and relocation of existing through lanes for the roundabout. Remove access to and cul-de-sac Needles Road.

**Laurel Bay Road/Joe Frazier Road Roundabout** - Convert intersection between Joe Frazier Road and Laurel Bay Road into a single-lane roundabout. Widen roadways for channelization and relocation of existing through lanes for the roundabout. Remove existing eastbound slip lane and westbound turn lanes along Laurel Bay Road. Remove existing northbound left-turn lane along Joe Frazier Road. Remove or relocate frontage road access as appropriate to accommodate roundabout operations.

**Laurel Bay Road/Bay Pines Road Roundabout** - Convert intersection between Laurel Bay Road and Bay Pines Road into a single-lane roundabout. Widen roadways for

channelization and relocation of existing through lanes for the roundabout. Remove or relocate frontage road access as appropriate to accommodate roundabout operations.

**Shanklin Rd Reduced Conflict Intersection (RCI)** - Intersection improvement at Shanklin Road and US 21. Eliminate left turn movement from Shanklin Road. Include U-turn at Kimes Avenue. No raised median on US 21. Project included in 2025 US 21 Corridor Study by HDR.

**Roseida Road Reduced Conflict Intersection (RCI)** - Intersection improvement at Roseida Road and US 21. Eliminate left turn movements from Roseida Road and Cavalry Lane. Includes U-turns both Northbound and Southbound. No raised median on US 21. Project included in 2025 US 21 Corridor Study by HDR.

**Middle Rd/SC 802 Roundabout Improvements** - Roundabout improvements at intersection of Middle Road and SC 802 as shown in 2024 LCOG Safety Action Plan.

**Guardrail on Middle Rd (B/W Doe Rd & Buck Rd)** - Install approximately 600' of guardrail at the outside of the horizontal curve, as shown in the LCOG Safety Action Plan.

## Widening

**SC 170 (SC 462 to US 278)** - Widen SC 170 from US 278 to SC 462 from 4 to 6 lanes. Construct a series of signalized reduced conflict intersections with intermittent U-turn lanes and bulb outs. Implement a shared use path on the western side of SC 170.

**US 278 (SC 170 to Jasper County Line)** – Widen US 278 from Beaufort County line to SC 170 from 4 to 6 lanes. Implement adaptive signal timing and update all clearance times at signalized intersections using latest standards. Close existing median cuts between main intersections. Improve lighting throughout the study area. Implement intersection improvements at University Boulevard, Community College Drive, Sun City Boulevard, Palmer Grace Drive West.

**SC 46 (SC 17 to Jasper County Line)** - Four-lane widening of SC 46 from SC 170 to the New River bridge at the Jasper County line as depicted in the Concept Designs by Mead and Hunt and the 2024 LCOG Safety Action Plan.

**Neil Road Intersection Improvements** – Signalized intersection at Neil Road. Fourth leg of intersection accessing Beaufort Station. Realign Spanish Moss Trail to signal.

## Resurfacing and Dirt Road Paving

### Dirt Road Paving

- Arum Cir N
- Briars Creek Rd
- Comet Ln
- Creek View Dr
- Dockside Ln
- Huspah Creek Dr
- Judge Island Dr
- Mr McBryde Ln
- Najas Dr
- Nyssa Ln
- O'connor Rd
- Sandstone Cir
- Sawgrass Ct
- Sparkleberry Dr
- Sugar Hill Landing Rd
- Sweet Grass Dr
- Worthington Rd
- Kline Cir

**Municipally Owned Roads**

- **City of Beaufort**
  - Battery Green Court
  - Bladen Ln
  - Bowling Ln
  - Bray St
  - Broad St
  - Candleberry Ln
  - Capers St
  - Coleman Ln
  - Crofut Ln (alleyway)
  - Dutchess Ln (mid-twn)
  - Elliot St
  - Elton Ln
  - Firehouse Ln
  - Fuller St
  - Hanover Ln
  - Lady Ln (mid-twn)
  - Old Commons Ln (alywy)
  - Old Trail Rd

- Phillips St
- Polk St
- Princess Ln (Mid-twn)
- Reynolds St
- Rhett St (dirt)
- Von Harten St (dirt)
- Waters Edge Court East
- Waters Edge Court West
- Acorn Hill Ave
- Burton Hill Rd
- Calhoun St
- Charles St
- Church St
- Church St
- Lovejoy St
- Lovejoy Way
- Morris St
- Newcastle St
- North St
- Old Salem Rd
- Palmetto Dr
- Palmetto St
- Prince St
- Rodgers Dr
- Simms St
- Sycamore St
- Union St
- Washington St
- Westview Ave
- Otter Circle
- Ferrets End
- Wolverine Dr
- Mustelidae Rd
- Pine Martin Rd
- Beavers Den
- Stone Marten Circle
- Stone Marten Drive
- Anchorage Way
- Battery Chase
- De La Gaye Point

- Fiveoaks Cir
- Islands Ave
- Island Cir
- Palmetto Place
- Plough Place
- Sunset Court
- Brighton Ln
- Cottage Farm Dr
- Dover Ln
- Glendale Ln (north)
- Glendale Ln (south)
- McChesney Ln
- Stafford Ln
- Joshua Circle
- Joshua Court
- Craven St
- New St
- Port Republic St
- **Town of Port Royal**
  - Old Shell Road
  - Tamara Ln
  - Old Fort Rd
  - Berkley Cir
  - Old Shell Ct
  - Laurel St
  - Stuart Towne Ln
- **Town of Hilton Head Island**
  - Adrianna Lane
  - Alex Patterson Road
  - Arrow Road
  - Automobile Place
  - Bayberry Lane
  - Bayberry Lane
  - Blazing Star Lane
  - Bobwhite Lane
  - C. Heinrichs Circle
  - Cassina Lane
  - Castnet Drive
  - Central Avenue
  - Chamberlin Drive

- Cooperative Way
- Dogwood Lane
- Dove Street
- Dune Lane
- Dunnagans Alley
- Egret Street
- Elderberry Lane
- Electric Avenue
- Exchange Street
- Flamingo Road
- Firethorn Lane
- Fish Haul Creek Park Common
- Fresh Market/Hargray Driveways
- Gannet Street
- Habitat Circle
- Haig Point Circle
- Hargray/Frsh Mrkt Drvwy
- Heron Street
- Hickory Lane
- Honey Horn Drive
- Hospital Center Boulevard
- Humane Way
- Indigo Run Drive
- Jarvis Park Road
- Juniper Lane
- Katie Miller Road
- Kingbird Lane
- Kingfisher Street
- Lark Street
- Laurel Lane
- Lemoyne Avenue
- Lagood Road Extension
- Mac Donough Lane
- Main Street (East Or North Segment)
- Main Street (West Segment)
- Mallard Street
- Mallard Street
- Meeting Street
- Merchant Street
- Mingo Way

- Museum Street
- Myrtle Lane
- Nassau Street
- Natures Way
- Nighthawk Street
- Oak Park Drive
- Office Park Road
- Osprey Street
- Otter Hole Road
- Pelican Street
- Pelican Street
- Power Alley
- Quail Street
- Queens Way (Whp-Hargray)
- Rhiner Drive
- Roadrunner Lane
- Robin Street
- Sandpiper Street
- Sandpiper Street
- Sea Oak Lane
- Summit Drive
- Tanglewood Drive
- Thompson Street
- Town Center Court
- Wanderer Lane
- Wild Horse Road
- Wiley Road
- **Town of Bluffton**
  - Allen St
  - Boundary St
  - Bridge St
  - Buckwalter Place Blvd
  - Calhoun St
  - Church St
  - Colcock St
  - Cove St
  - Dr Mellichamp
  - Dubois Ln
  - Future Hampton Pkwy
  - Green St

- Guerrard Ave
- Hampton Pkwy
- Innovation Dr
- Lawrence St
- Lawton St
- Maiden Ln
- Pope Ln
- Pritchard St
- Progressive St
- S Innovation Dr
- Thomas Heyward St
- Water St
- Wharf St

**Daufuskie Island Resurfacing**

- Cooper River Landing Rd
- Haig Point Rd
- Melrose Landing Rd
- Old Haig Point Rd
- Pappys Landing Rd

**Trask Parkway (US 17)** - From the Jasper County line to US 21 at Garden's Corner.

**Trask Parkway (US 21)** – From US 17 at Garden's Corner to Wood's Memorial Bridge, Lady's Island Dr, and Ribaut Rd (Port Royal section)

**Sea Island Parkway (US 21)** – From the Lady's Island Wal-Mart area to the Harbor Island Bridge

**Sam's Point Road (SC 802)** – From Sea Island Parkway to the roundabout

**Parris Island Gateway (US 21)** – From Boundary Street to Bell Bridge

**Savannah Highway (SC 128)** – From SC 170 to Parris Island Gateway

**Robert Smalls Parkway/Okatie Highway (SC 170)** – From Boundary Street to SC 462 and from US 278 to SC 46 at the roundabout

**Buckwalter Parkway** – From US 278 to SC 46

**Bluffton Parkway** – From SC 170 to Buck Island Road and from Red Cedar Rd to US 278 flyover

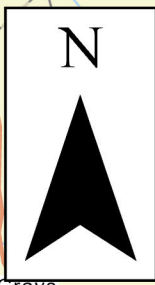
**Fording Island Road (US 278)** – From SC 170 to the Hilton Head Island Bridge

**William Hilton Parkway (US 278 Business) – From the Hilton Head Island Bridge to  
Sea Pines Circle**

## 2026 Transportation Sales Tax Project List

Section V. Item #4.

Project Name	Estimated Cost	Project Type	District
Ribaut Rd/ Lady's Island Dr- Turn Lane Construction	\$4,800,000	Intersection/Safety Improvements	District 4
Traffic Signal Improvements	\$19,075,000	Intersection/Safety Improvements	
SC 170/US 278 Diverging Diamond Interchange	\$18,054,000	Intersection/Safety Improvements	District 5
Squire Pope/William Hilton Pkwy Improvements	\$14,400,000	Intersection/Safety Improvements	District 10
Ribaut Road Corridor Improvement (City of Beaufort)	\$28,370,000	Intersection/Safety Improvements	District 4
Lady's Island Dr/Meridian Rd Improvements	\$8,164,000	Intersection/Safety Improvements	District 3
US 21 Improvements at Chowan Creek	\$3,850,000	Intersection/Safety Improvements	District 3
SC 170/SC 46 Intersection Conversion	\$10,237,000	Intersection/Safety Improvements	District 6
SC 462 Realignment	\$19,760,000	Intersection/Safety Improvements	District 5
SC 170 Corridor Improvements N.O.B.	\$6,200,000	Intersection/Safety Improvements	District 1
Spanish Wells/William Hilton Pkwy Improvements	\$39,700,000	Intersection/Safety Improvements	District 10
Savannah Hwy & SC 170 Improvements	\$1,020,000	Intersection/Safety Improvements	District 4
Warsaw Island Rd	\$4,550,000	Intersection/Safety Improvements	District 3
Bluffton Pkwy/SC46 Roundabout Improvements	\$6,000,000	Intersection/Safety Improvements	District 9
B.E Wheatley Dr/Robert Smalls Pkwy Signal	\$1,540,000	Intersection/Safety Improvements	District 1
US 278/Sun City Signal Improvements	\$2,623,000	Intersection/Safety Improvements	District 5
US 278 & Buck Island Rd	\$1,800,000	Intersection/Safety Improvements	District 8
Ribaut Rd/Depot Rd Intersection	\$3,750,000	Intersection/Safety Improvements	District 4
Gumtree Rd Improvements	\$15,600,000	Intersection/Safety Improvements	District 10
US 278 & Simmonsville Rd	\$2,220,000	Intersection/Safety Improvements	District 8
Bluffton Pkwy Improvements	\$7,130,000	Intersection/Safety Improvements	Districts 7/9
Gateway to Port Royal (Ribaut Rd)	\$19,360,000	Intersection/Safety Improvements	District 4
Gibbet Rd Signal	\$4,075,000	Intersection/Safety Improvements	District 6
Grober Hill Rd/Parris Island Gtwy Intersection	\$1,190,000	Intersection/Safety Improvements	District 1
High Visibility Crosswalks & RRFBs (Downtown Beaufort)	\$2,873,000	Intersection/Safety Improvements	District 2
Short's Landing Signal	\$1,320,000	Intersection/Safety Improvements	District 2
Sea Pines Circle	\$15,600,000	Intersection/Safety Improvements	District 11
Evans Way/SC 170- Signalized RCI	\$7,878,000	Intersection/Safety Improvements	District 6
RI/RO at Bluffton Pkwy/Goethe Rd	\$1,220,000	Intersection/Safety Improvements	District 9
Median Closings US 278	\$1,345,000	Intersection/Safety Improvements	District 8
Old Jericho Rd Bridge Replacement	\$1,710,000	Intersection/Safety Improvements	District 1
Goethe Rd Resurfacing/Traffic Calming	\$420,000	Intersection/Safety Improvements	District 9
Main Street Road Improvements	\$9,500,000	Intersection/Safety Improvements	District 10
Grober Hill Rd Corridor Improvements	\$8,310,000	Intersection/Safety Improvements	District 1
William Hilton Pkwy- Chaplin Corridor	\$9,100,000	Intersection/Safety Improvements	District 11
Stardust Ln Signal	\$811,000	Intersection/Safety Improvements	District 6
Buckwalter Pkwy (HE McCracken Cir Section)	\$4,340,000	Intersection/Safety Improvements	District 7
Joe Frazier Rd Roundabout	\$4,642,000	Intersection/Safety Improvements	District 1
Laurel Bay/Joe Frazier Roundabout	\$5,326,000	Intersection/Safety Improvements	District 1
Laurel Bay/Bay Pines Roundabout	\$4,331,000	Intersection/Safety Improvements	District 1
Shanklin Rd RCI	\$690,000	Intersection/Safety Improvements	District 2
Roseida Rd RCI	\$850,000	Intersection/Safety Improvements	District 2
ITS Downtown Bridge Design/Construction	\$690,000	Intersection/Safety Improvements	District 2
Middle Rd/SC 802 Roundabout Improvements	\$1,860,000	Intersection/Safety Improvements	District 2
Guardrail on Middle Rd (B/W Doe Rd & Buck Rd)	\$140,000	Intersection/Safety Improvements	District 2
Okatie Highway (SC 170)	\$103,840,000	Widening	District 5
Okatie Highway (SC 46)	\$44,170,000	Widening	District 6
W Fording Island Road (US 278)	\$51,984,000	Widening	District 5
Robert T Smalls Parkway (SC 170)	\$4,650,000	Widening	District 3/4
Dirt Roads (See project descriptions)	\$12,381,521	Resurfacing/Dirt Road Paving	
Municipal Resurfacing - City of Beaufort (See project descriptions)	\$6,721,000	Resurfacing/Dirt Road Paving	
Municipal Resurfacing - Town of Port Royal (See project descriptions)	\$1,034,000	Resurfacing/Dirt Road Paving	
Municipal Resurfacing - Town of HHI (See project descriptions)	\$8,272,000	Resurfacing/Dirt Road Paving	
Municipal Resurfacing - Town of Bluffton (See project descriptions)	\$3,877,500	Resurfacing/Dirt Road Paving	
Daufuskie Island Resurfacing (See project descriptions)	\$7,619,437	Resurfacing/Dirt Road Paving	
Trask Parkway (US 17)	\$12,542,000	Resurfacing/Dirt Road Paving	District 1
Trask Parkway (US 21)	\$46,708,500	Resurfacing/Dirt Road Paving	District 1/2/3/4
Sea Island Parkway (US 21)	\$11,700,000	Resurfacing/Dirt Road Paving	District 3
Sam's Point Road (SC 802)	\$5,319,300	Resurfacing/Dirt Road Paving	District 2
Parris Island Gateway (US 21)	\$12,292,500	Resurfacing/Dirt Road Paving	District 1/4
Savannah Highway (SC 128)	\$4,867,200	Resurfacing/Dirt Road Paving	District 1
Robert Smalls Parkway (SC 170)	\$42,073,200	Resurfacing/Dirt Road Paving	District 1/3/5/6/7
Buckwalter Parkway	\$10,099,700	Resurfacing/Dirt Road Paving	District 7
Bluffton Parkway	\$14,661,600	Resurfacing/Dirt Road Paving	District 7/8/9
Fording Island Road (US 278)	\$27,096,400	Resurfacing/Dirt Road Paving	District 10
William Hilton Parkway (US 278 Business)	\$21,294,000	Resurfacing/Dirt Road Paving	District 10
<b>Total</b>	<b>\$779,627,858</b>		

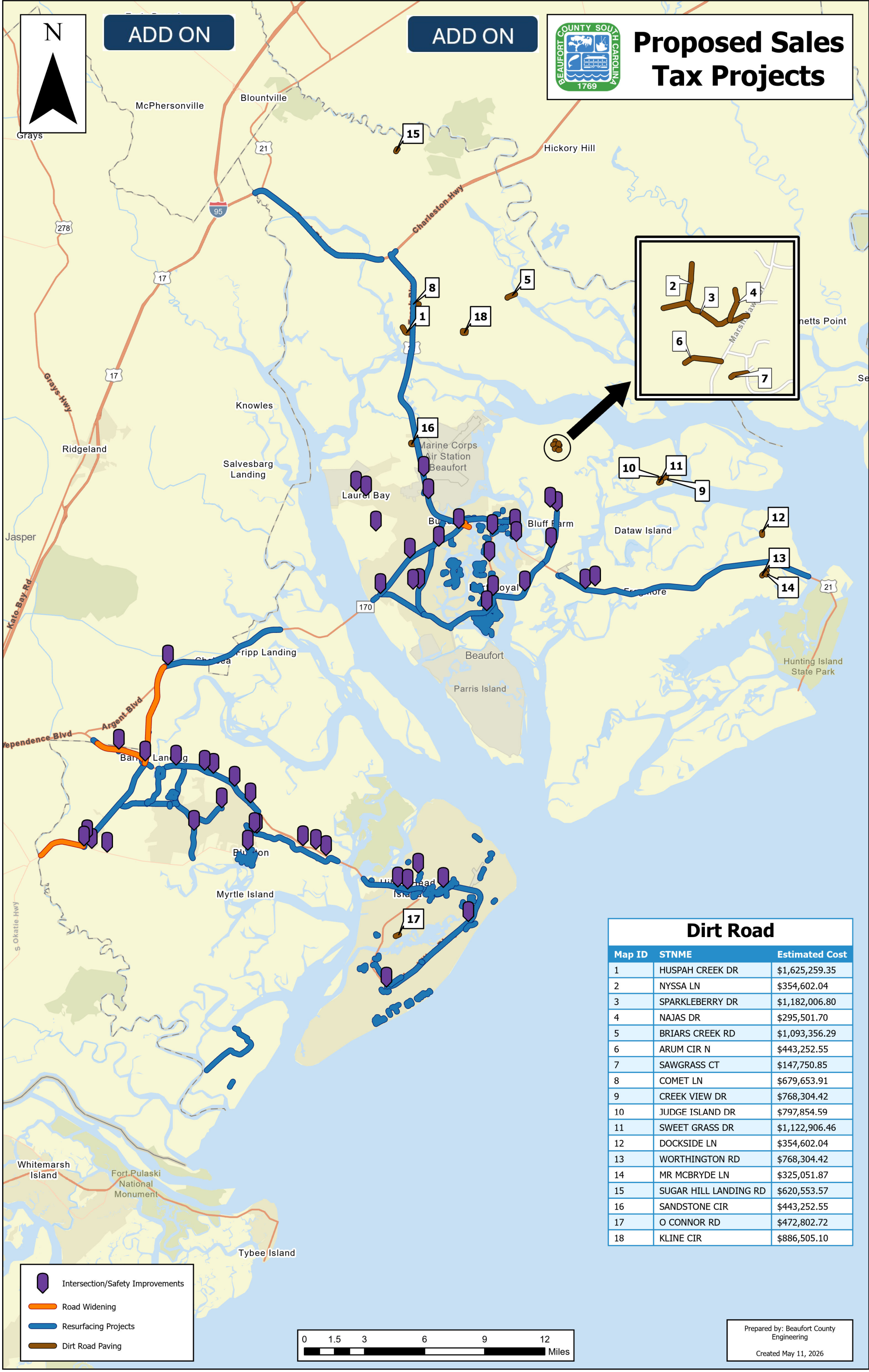


ADD ON

ADD ON



# Proposed Sales Tax Projects



Dirt Road		
Map ID	STNME	Estimated Cost
1	HUSPAH CREEK DR	\$1,625,259.35
2	NYSSA LN	\$354,602.04
3	SPARKLEBERRY DR	\$1,182,006.80
4	NAJAS DR	\$295,501.70
5	BRIARS CREEK RD	\$1,093,356.29
6	ARUM CIR N	\$443,252.55
7	SAWGRASS CT	\$147,750.85
8	COMET LN	\$679,653.91
9	CREEK VIEW DR	\$768,304.42
10	JUDGE ISLAND DR	\$797,854.59
11	SWEET GRASS DR	\$1,122,906.46
12	DOCKSIDE LN	\$354,602.04
13	WORTHINGTON RD	\$768,304.42
14	MR MCBRYDE LN	\$325,051.87
15	SUGAR HILL LANDING RD	\$620,553.57
16	SANDSTONE CIR	\$443,252.55
17	O CONNOR RD	\$472,802.72
18	KLINE CIR	\$886,505.10

- Intersection/Safety Improvements
- Road Widening
- Resurfacing Projects
- Dirt Road Paving



Prepared by: Beaufort County Engineering  
Created May 11, 2026

TOWN COUNCIL  
STAFF REPORT



<b>MEETING DATE:</b>	June 09, 2026
<b>PROJECT:</b>	Formal Item: Consideration of an Ordinance Approving the Town of Bluffton Fiscal Year 2027 Proposed Consolidated Budget – Public Hearing & Final Reading
<b>PROJECT MANAGER:</b>	Stephen Steese, Town Manager

**REQUEST:**

Town Council approves the second and final reading of the Ordinance for the Town of Bluffton FY 2027 Consolidated Budget of \$113,913,988, guided by the Town Mission statement and the Town of Bluffton Strategic Plan Action Agenda for FY 2027.

**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 FY2027 consists of six major funds, which includes the General Fund, the Stormwater Fund, the Capital Improvements Program (CIP) Fund, and the Debt Service Fund, as well as two Special Revenue Funds, Hospitality Tax Fund and Local Accommodations Tax Fund.

The proposed consolidated budget is an increase of 4.4% or \$4,839,292 from the revised FY2026 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.

**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 37.8% or \$43,072,067 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 \$8,662,591 or 7.6% 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 \$4,095,729 or 3.6% 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 4.8% or \$5,418,688 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 34.4% or \$39,210,880 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 \$13,454,033 or 11.8% of the consolidated budget and supports the debt service for the 2022 Tax Increment Revenue Bond, 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:**

The Fiscal Year 2027 budget begins July 1, 2026.

**ATTACHMENTS:**

1. FY2027 Proposed Consolidated Budget Executive Summary
2. Ordinance for Fiscal Year 2027 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, SC**

## **FY2027 PROPOSED BUDGET**

### **For the Fiscal Year Ended June 30, 2027**

**Town of Bluffton**

20 Bridge Street, Bluffton, SC 29910  
843.706.4500



**bluffton**  
HEART OF THE LOWC



Town of Bluffton, South Carolina  
Consolidated Municipal Budget  
Fiscal Year  
July 1, 2026 through June 30, 2027

Elected Officials

Mayor - The Honorable Larry Toomer

Council Members:

Mayor Pro Tempore – Fred Hamilton

Emily Burden

Bridgette Frazier

Dan Wood

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

Larry Beckler

Lisa Cunningham

Kevin Icard

Kim Jones

Natalie Majorkiewicz

Paul Arvantides

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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## The Covenant for the Town of Bluffton

**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.

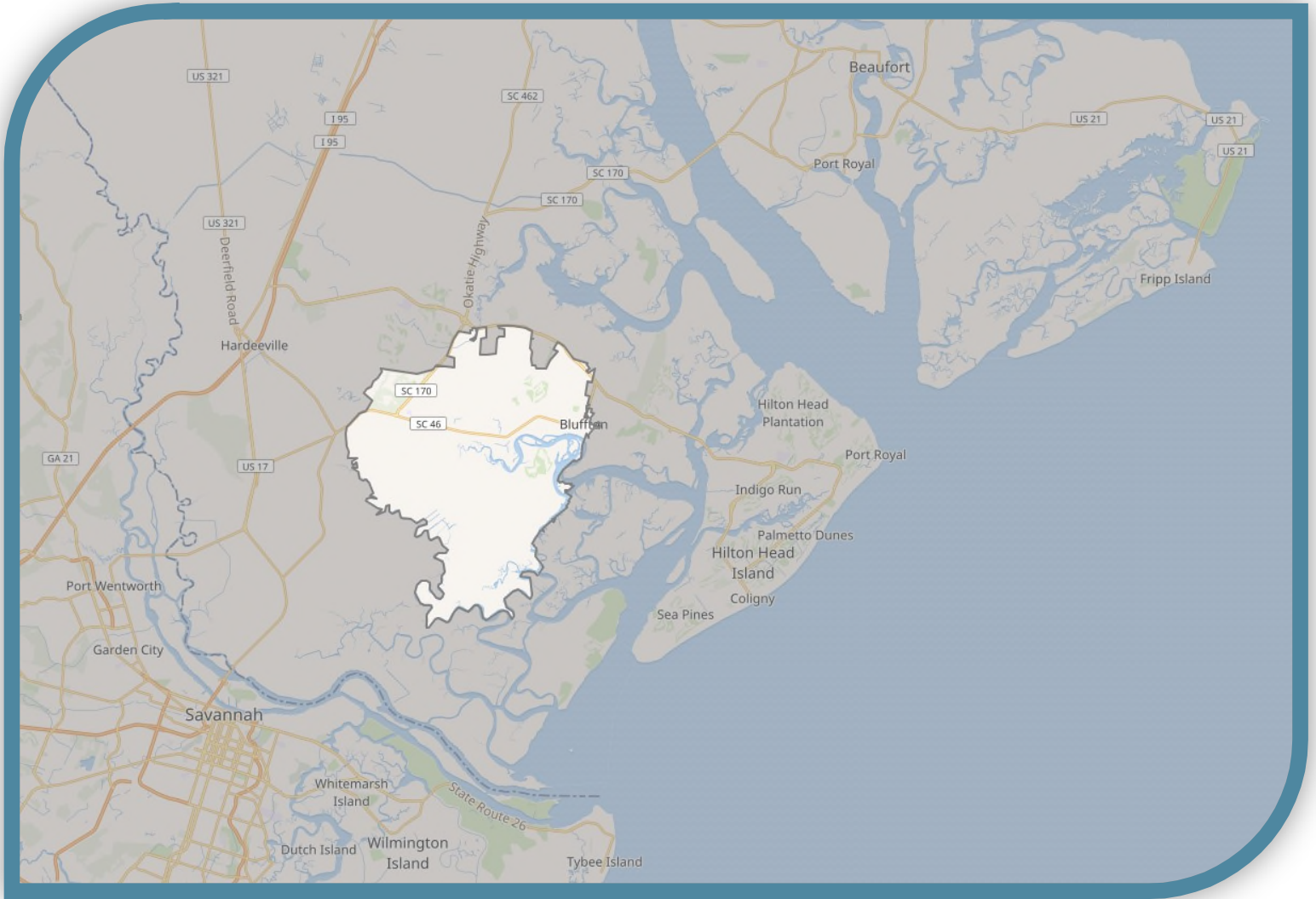
## Why Does the Town Prepare a Budget?

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. 23.



## 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 fifty-four (54) square miles and has seen the population increase from 738 to over 35,000 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 are included.

Most of Bluffton’s 54.29 square miles are already master planned. Ninety-two (92%) percent of the Town is regulated by Planned Unit Developments with Development Agreements. As of December 31, 2025, approximately 83% (or 14,717 Residential Dwelling Units “RDUs”) of the 20,680 RDUs have been utilized and 33% (or 525 acres of commercial rights) of the roughly 1,600 acres of commercial rights have been utilized. 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** *Safe Living, March 2025*
- **#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.*
- **Aaa Municipal Bond Rating, the highest rating for a municipality,** *Moody’s Investors Service, 2023*
- **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*
- **2022 Municipal Achievement Award, Public Service Category** *Mental Health & Wellness Program*
- **2023 Municipal Award** *Neighborhood Assistance Program*
- **2025 Preservation Service Award for the Town’s Historic Preservation Grant Program** *South Carolina Historic Preservation Award Program, June 2025*
- **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, FY2025, and FY2026.*

## Town of Bluffton at a Glance (Continued)

### Recent Awards and Recognitions (continued):

- **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.*

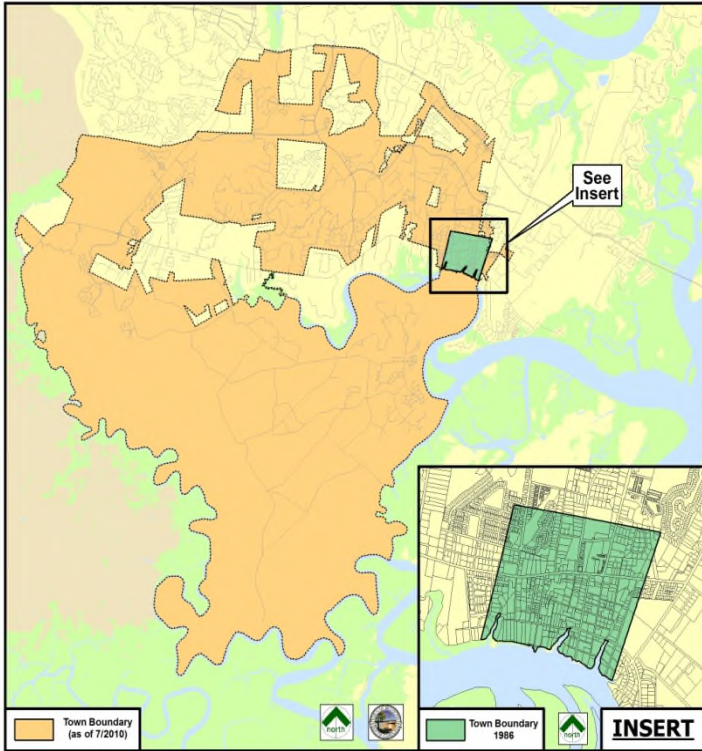
Bluffton is also home to Palmetto Bluff, a 19,271-acre world-renowned residential community and resort, which consistently receives top awards and accolades. Palmetto Bluff celebrated its grand debut of Montage Palmetto Bluff in August 2016. Montage Palmetto Bluff is AAA 5-diamond resort with 200 rooms, 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:



- **Forbes Travel Guide Five-Star Rating (2026)**
- **U.S. News & World Report Best Hotels (2026)**
  - Best USA Hotels (#10) & Best USA Resorts (#5)
  - Best Hilton Head Hotels (#1) & Best Hilton Head Resorts (#1)
  - Best South Carolina Hotels (#1) & Best South Carolina Resorts (#1)
- **Wine Spectator’s Restaurant Awards Best of Award of Excellence (2025)**
- **Travel + Leisure World’s 500 Best Hotels List (2025)**
- **Forbes Travel Guide Five-Star Rating (2025)**
- **Forbes Travel Guide Five-Star Spa Rating (2025)**
- **U.S. News & World Report Best Hotels (2025)**
  - Best USA Hotels (#12) & Best USA Resorts (#8)
  - Best Hilton Head Hotels (#1) & Best Hilton Head Resorts (#1)
  - Best South Carolina Hotels (#1) & Best South Carolina Resorts (Ranked #1)
- **MICHELIN Guide Two Key Hotel (2024 & 2025)**
- **Wine Spectator’s Restaurant Awards Best of Award of Excellence (2024)**
- **Modern Luxury Travel Awards Best Hospitality (2024)**
- **Forbes Travel Guide Five-Star Rating (2024)**
- **Forbes Travel Guide Five-Star Spa Rating (2024)**

Source: [Montage Palmetto Bluff Press Room](#)

## 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 54.29 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 FY2027 is \$524,000.

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, Lisa Sulka, then Town of Bluffton Mayor, 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, 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. Since then, the Town has entered into eight (8) additional Economic Development Incentive Program agreements.

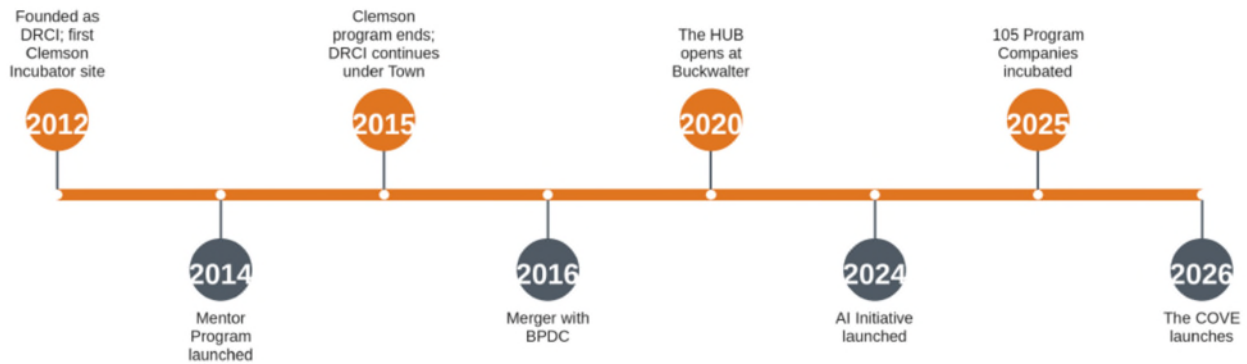
The Don Ryan Center for Innovation (DRCI) was established in mid-2012 as a 501(c)(3) nonprofit in Bluffton, South Carolina. Founded to strengthen the local entrepreneurial ecosystem, the organization provides innovators, entrepreneurs, startups, and early-stage businesses with the resources, mentorship, and guidance they need to succeed, with the broader goal of driving sustainable economic development and job creation in Bluffton and the surrounding Lowcountry region. Over more than a decade of operation, the Center has grown from a convening and support concept into a visible hub for business-building. It hosts workshops, speaker events, and partnerships with regional organizations while working closely with program clients and expanding its role as a bridge between innovators, local government, education, and the private sector.



The Center was named in honor of Don Ryan, co-founder of CareCore National (now eviCorehealthcare), who donated the original office space to the incubator before his untimely passing in 2012. From those roots, DRCI has grown into the Lowcountry’s leading hub for entrepreneurship and economic development.

## Town of Bluffton at a Glance (Continued)

### Local Economy (continued)



The Don Ryan Center for Innovation operates across two facilities in Bluffton, creating a complete campus for entrepreneurship, innovation, and economic development.

The HUB: Opened in March 2020 at the Buckwalter Place Commerce Park (7 Venture Drive #100, Bluffton, SC 29910), The HUB is the primary gathering space for programs, workshops, collaboration, and innovation. More than just a place to work, it is a community-centered environment where good things happen when people innovate together.



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.

The COVE: Bluffton’s economic development center, The COVE serves as a second location housing program companies and key partner organizations. Groundbreaking took place in September 2024, with the facility launching in 2026.



The Landing Pad: A flexible rental office space designed for companies exploring relocation to Bluffton, giving businesses a low-commitment foothold in the region as they evaluate the local market. The Landing Pad program specifically supports business recruitment by giving companies exploring relocation a flexible, low-risk way to experience Bluffton before making a permanent commitment.

The Don Ryan Center for Innovation plays a central role in Bluffton’s broader economic development strategy. In partnership with the Town of Bluffton, the Center administers the Economic Development Incentive Program (EDIP) and maintains a network of regional partners to attract, retain, and grow businesses in Beaufort County. To discover how the Don Ryan Center for Innovation can help you make a difference, visit [www.donryancenter.com](http://www.donryancenter.com).

# Organizational Chart



## Budget Highlights

The proposed budget, totaling \$113,913,988, 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 3% cost of living and up to 4% mid-year merit increase capped at \$3,000 for employees
- ✓ Supports staffing changes described on page 20

The Council priority programs for FY2027 include Affordable Housing, through a committee formed in FY2020 and is funded in the amount of \$450,000 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 \$1,945,325 budgeted to assist in the completion of the first development of affordable housing and adds a second project budgeted at \$1,200,000.

Other initiatives include funding for the Historic Preservation Program, enhanced employee programs that include a cost of living 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 proposed budget invests in civic space, Town facilities, and environmental initiatives. Over \$39 million in capital projects are in the FY2027 proposed budget. These projects include significant investment with land acquisition, public infrastructure in facilities and parks improvements with the largest being the New River Trail. Additionally, multiple projects are planned with a focus on parks, streetscapes and sewer and watershed protection.



## FY 2027 Consolidated Proposed Budget Summary by Fund



Fund	FY 2026 Revised Budget	FY 2027 Proposed Budget	% Change	% of Budget
General Fund	\$ 38,322,427	\$ 43,072,067	12.4%	37.8%
Hospitality Tax Fund	8,938,984	8,662,591	-3.1%	7.6%
Local Accommodations Tax Fund	2,820,487	4,095,729	45.2%	3.6%
Stormwater Fund	5,822,543	5,418,688	-6.9%	4.8%
Capital Improvement Program Fund	42,120,585	39,210,880	-6.9%	34.4%
Debt Service Fund	11,049,670	13,454,033	21.8%	11.8%
<b>Total Consolidated Budget</b>	<b>\$ 109,074,696</b>	<b>\$ 113,913,988</b>	<b>4.4%</b>	<b>100.0%</b>

### 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.

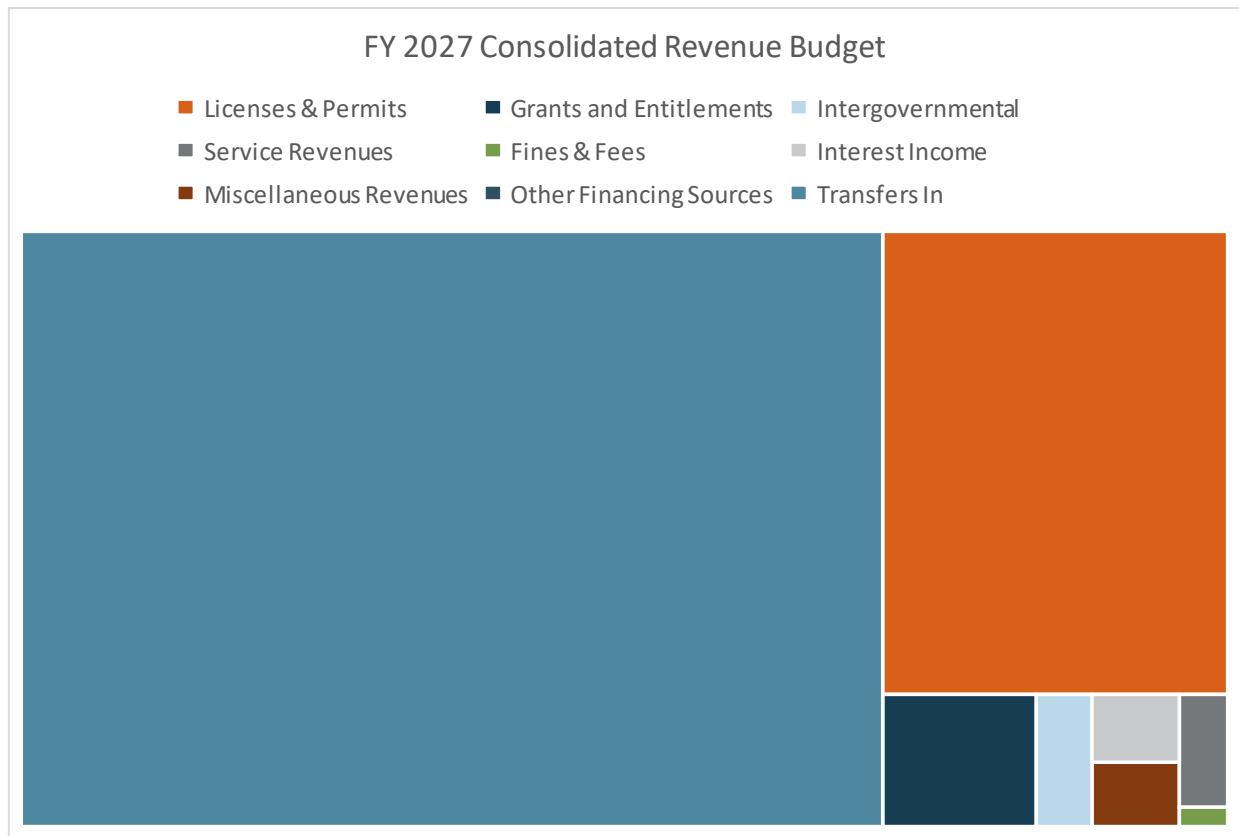
### **Capital Improvements Program (CIP) Fund**

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**

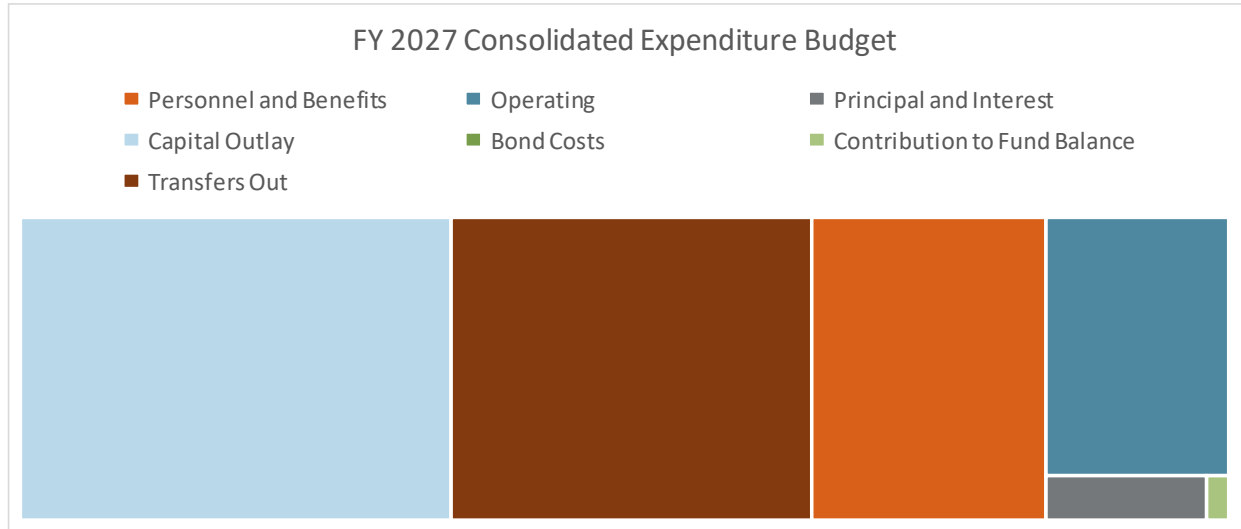
Accounts for the accumulation of resources for the payment of interest and principal on general long-term debt obligations. The primary source of revenue is property tax and bond proceeds.

## Where Our Funding Comes From



Revenues	FY 2026		FY 2027		\$	%
	Revised Budget	% of Budget	Proposed Budget	% of Budget		
Property Taxes	\$ 16,524,147	15.1%	\$ 17,502,132	15.4%	\$ 977,985	5.9%
Local Hospitality & Accommodations Taxes	5,459,747	5.0%	5,802,929	5.1%	343,182	6.3%
Licenses & Permits	17,406,121	16.0%	20,167,184	17.7%	2,761,063	15.9%
Grants and Entitlements	3,008,901	2.8%	2,587,354	2.3%	(421,547)	-14.0%
Intergovernmental	4,907,678	4.5%	935,852	0.8%	(3,971,826)	-80.9%
Service Revenues	748,000	0.7%	697,800	0.6%	(50,200)	-6.7%
Fines & Fees	115,000	0.1%	115,000	0.1%	-	0.0%
Interest Income	475,000	0.4%	744,000	0.7%	269,000	56.6%
Miscellaneous Revenues	703,472	0.6%	703,472	0.5%	-	0.0%
<b>Sub-Total Revenues</b>	<b>49,348,066</b>	<b>45.2%</b>	<b>49,255,723</b>	<b>43.2%</b>	<b>(92,343)</b>	<b>-0.2%</b>
Transfers In	59,726,630	54.8%	64,658,265	56.8%	4,931,635	8.3%
<b>Sub-Total Other Financing Sources</b>	<b>59,726,630</b>	<b>54.8%</b>	<b>64,658,265</b>	<b>56.8%</b>	<b>4,931,635</b>	<b>8.3%</b>
<b>Total Consolidated Revenues</b>	<b>\$ 109,074,696</b>	<b>100.0%</b>	<b>\$ 113,913,988</b>	<b>100.0%</b>	<b>\$ 4,839,292</b>	<b>4.4%</b>

## Where Our Resources Go



Expenditures	FY 2026		FY 2027		\$		%	
	Revised Budget	% of Budget	Proposed Budget	% of Budget	Budget Change		Budget Change	
Personnel and Benefits	\$ 20,697,109	19.0%	\$ 22,179,543	19.5%	\$ 1,482,434		7.2%	
Operating	14,492,642	13.3%	14,624,873	12.8%	132,231		0.9%	
Principal and Interest	2,244,714	2.1%	2,242,714	2.0%	(2,000)		-0.1%	
Capital Outlay	2,552,620	2.3%	1,638,686	1.4%	(913,934)		-35.8%	
Economic Development Projects	1,003,086	0.9%	1,098,948	1.0%	95,862		9.6%	
Facilities Projects	3,465,436	3.2%	4,789,983	4.2%	1,324,547		38.2%	
Housing Projects	1,230,396	1.1%	1,945,325	1.7%	714,929		58.1%	
Information Technology Infrastructure Projects	200,912	0.2%	40,603	0.0%	(160,309)		-79.8%	
Land Acquisition	13,669,302	12.5%	11,600,000	10.2%	(2,069,302)		-15.1%	
Park Projects	8,287,924	7.6%	6,415,261	5.6%	(1,872,663)		-22.6%	
Road Projects	5,769,415	5.3%	7,184,948	6.3%	1,415,533		24.5%	
Stormwater and Sewer Projects	8,177,114	7.5%	5,818,812	5.1%	(2,358,302)		-28.8%	
<b>Sub-Total Expenditures</b>	<b>81,790,670</b>	<b>75.0%</b>	<b>79,579,696</b>	<b>69.8%</b>	<b>(2,210,974)</b>		<b>-2.7%</b>	
Contribution to Fund Balance	317,000	0.3%	317,000	0.3%	-		0.0%	
Transfers Out	26,967,026	24.7%	34,017,292	29.9%	7,050,266		26.1%	
<b>Sub-Total Other Financing Uses</b>	<b>27,284,026</b>	<b>25.0%</b>	<b>34,334,292</b>	<b>30.2%</b>	<b>7,050,266</b>		<b>25.8%</b>	
<b>Total Consolidated Expenditures</b>	<b>\$ 109,074,696</b>	<b>100.0%</b>	<b>\$ 113,913,988</b>	<b>100.0%</b>	<b>\$ 4,839,292</b>		<b>4.4%</b>	

## Town Workforce

Personnel by Department and Division	FY 2025 Budget		FY 2026 Budget		FY 2027 Budget		Change	
	Full Time	Part Time	Full Time	Part Time	Full Time	Part Time	Full Time	Part Time
Communications	4.0	2.0	2.0	1.0	2.0	1.0	-	-
Economic Development (DRCI)	3.0	-	3.0	1.0	4.0	-	1.0	(1.0)
Events & Venues	-	-	3.0	5.0	4.0	4.0	1.0	(1.0)
Executive Office	8.5	1.0	9.5	1.0	9.5	1.0	-	-
Finance & Administration	8.5	-	10.0	-	10.0	-	-	-
Growth Management Department							-	-
Building Safety Division	8.0	-	8.0	-	8.0	-	-	-
Customer Service Division	3.5	-	3.0	-	3.0	-	-	-
Planning & Community Development Division	8.0	-	6.0	-	6.0	-	-	-
Human Resources	3.0	-	3.0	-	3.0	-	-	-
Information Technology	7.5	-	7.5	-	8.5	-	1.0	-
Municipal Court	3.0	-	3.0	-	3.0	-	-	-
Police Department							-	-
Civilian Positions	11.0	10.0	11.0	10.0	11.0	10.0	-	-
Sworn Positions by Rank	65.0	-	66.0	-	66.0	-	-	-
Projects & Watershed Resilience Department							-	-
Project Management Division	6.0	-	6.0	-	6.0	-	-	-
Watershed Management Division (SWU Fund)	9.0	-	9.0	1.0	11.0	1.0	2.0	-
Public Services	16.0	-	16.0	-	17.0	-	1.0	-
<b>Total Personnel</b>	<b>164.0</b>	<b>13.0</b>	<b>166.0</b>	<b>19.0</b>	<b>172.0</b>	<b>17.0</b>	<b>6.0</b>	<b>(2.0)</b>

### Position Changes:

#### DRCI:

- Attritted Director of Special Projects position
- Added Full-Time Business Engagement Manager
- Converted Part-Time Innovations Manager to Full-Time

#### Events & Venues:

- Converted one Part-Time Events & Venues Coordinator to Full-Time to include Bluffton Ambassador duties

#### Information Technology:

- Added new Law Enforcement Systems Analyst position

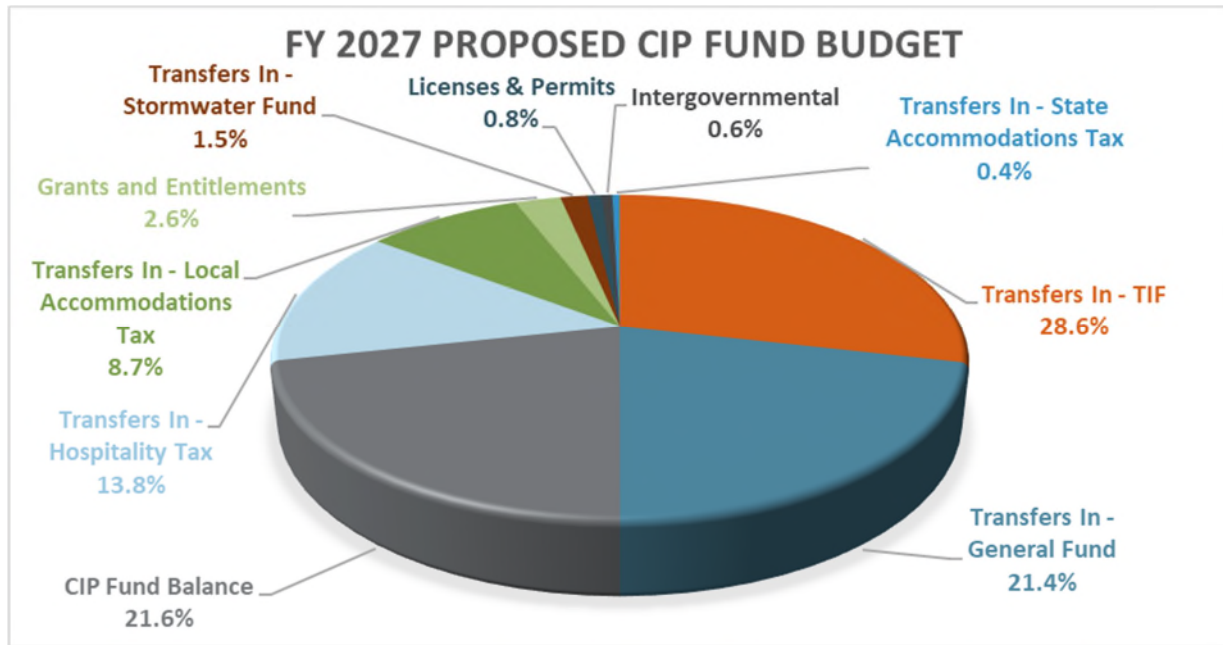
#### Watershed Resilience:

- MS4 Program Manager position re-added to department
- Second Full-Time Stormwater Project Manager position added for a half-year in anticipation of employee retirement; the temporary position will be attritted in FY2028

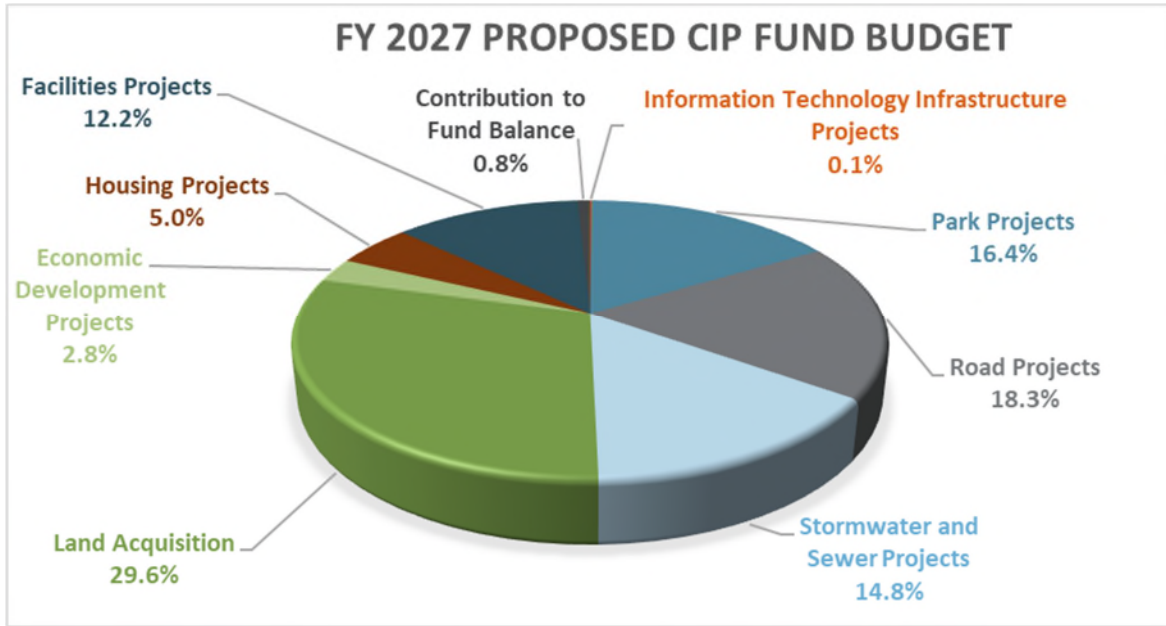
#### Public Services:

- Added one additional Public Services Worker

## Capital Improvement Program (CIP) Fund



Funding Sources	FY 2027 Proposed Budget	% of Budget
Transfers In - TIF	\$ 11,211,269	28.6%
Transfers In - General Fund	8,390,082	21.4%
CIP Fund Balance	8,465,266	21.6%
Transfers In - Hospitality Tax	5,417,372	13.8%
Transfers In - Local Accommodations Tax	3,425,529	8.7%
Grants and Entitlements	1,000,000	2.6%
Transfers In - Stormwater Fund	588,784	1.5%
Licenses & Permits	317,000	0.8%
Intergovernmental	232,990	0.6%
Transfers In - State Accommodations Tax	162,588	0.4%
<b>Total CIP Funding Sources</b>	<b>\$ 39,210,880</b>	<b>100.0%</b>



Project Expenditures	FY 2027 Proposed Budget	% of Budget
Economic Development Projects	\$ 1,098,948	2.8%
Facilities Projects	4,789,983	12.2%
Housing Projects	1,945,325	5.0%
Information Technology Infrastructure Projects	40,603	0.1%
Land Acquisition	11,600,000	29.6%
Park Projects	6,415,261	16.4%
Road Projects	7,184,948	18.3%
Stormwater and Sewer Projects	5,818,812	14.8%
Contribution to Fund Balance	317,000	0.8%
<b>Total CIP Expenditures</b>	<b>\$ 39,210,880</b>	<b>100.0%</b>

## Expenditure Budget by Fund

FY 2027 Proposed Budget

General Fund Budget	Salaries & Benefits	Operating	Capital Outlay	Debt	Total
Total General Fund Expenditures	\$ 20,731,931	\$ 12,311,368	\$ 1,638,686	\$ -	\$ 34,681,985
Contribution to Fund Balance					-
Transfer to Capital Improvements Program Fund					8,390,082
Total General Fund Budget					\$ 43,072,067

Hospitality Tax Fund Budget	Salaries & Benefits	Operating	Capital Outlay	Debt	Total
Transfer to General Fund	\$ -	\$ -	\$ -	\$ -	\$ 5,417,372
Transfer to Capital Improvements Program Fund					3,245,219
Total Hospitality Tax Fund Budget					\$ 8,662,591

Local Accommodations Tax Fund Budget	Salaries & Benefits	Operating	Capital Outlay	Debt	Total
Transfer to General Fund	\$ -	\$ -	\$ -	\$ -	\$ 3,425,529
Transfer to Capital Improvements Program Fund					670,200
Total Local Accommodations Tax Fund Budget					\$ 4,095,729

Stormwater Fund Budget	Salaries & Benefits	Operating	Capital Outlay	Debt	Total
Watershed Management Expenditures	\$ 1,447,611	\$ 2,313,455	\$ -	\$ -	\$ 3,761,066
Transfer to General Fund					774,538
Transfer to Debt Service					294,300
Transfer to Capital Improvements Program Fund					588,784
Total Stormwater Fund Budget					\$ 5,418,688

Capital Improvements Program Fund Budget	Capital Outlay	Total
Economic Development Projects	\$ 1,098,948	\$ 1,098,948
Facilities Projects	4,789,983	4,789,983
Housing Projects	40,603	40,603
Information Technology Infrastructure Projects	1,945,325	1,945,325
Land Acquisition	11,600,000	11,600,000
Park Projects	6,415,261	6,415,261
Road Projects	7,184,948	7,184,948
Stormwater and Sewer Projects	5,818,812	5,818,812
Contribution to Fund Balance	317,000	317,000
Total Capital Improvements Program Fund Budget		\$ 39,210,880

Debt Service Fund Budget	Operating	Principal	Interest	Total
Series 2022 TIF Bond	\$ -	\$ 1,282,293	\$ 290,321	\$ 1,572,614
Series 2020 GO Bond - LEC		280,000	95,800	375,800
Series 2020A GO Bond - SWU Projects		180,000	114,300	294,300
Miscellaneous Expenditures	50			50
Transfer to Capital Improvements Program Fund				11,211,269
Total Debt Service Fund Budget				\$ 13,454,033

## 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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HEART OF THE LOWCOUNTRY

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**AN ORDINANCE OF THE TOWN OF BLUFFTON  
ORDINANCE NO. 2026-  
FISCAL YEAR 2027 BUDGET**

**TO PROVIDE FOR THE LEVY OF TAX FOR THE TOWN OF BLUFFTON FOR THE FISCAL YEAR BEGINNING JULY 1, 2026 AND ENDING JUNE 30, 2026; 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 \$113,913,988 consisting of the General Fund of \$43,0172,067; the Hospitality Tax Fund of \$8,662,591; the Local Accommodations Tax Fund of \$4,095,729; the Stormwater Fund of \$5,418,688; the Capital Improvements Program Fund of \$39,210,880; and the Debt Service Fund of \$13,454,033.

**SECTION 2. ESTABLISHMENT OF PROPERTY TAX LEVY.**

A tax to cover the period from July 1, 2026, through June 30, 2027, 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 11, 2026 Council meeting.

**SECTION 3. ESTABLISHMENT OF A MASTER FEE SCHEDULE.**

A Master Fee Schedule listing all fees charged by the Town for Fiscal Year 2027 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 2027 appropriations.

Fiscal Year 2026 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 \$200,000 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 2027, this amount is established at \$11,977,526.

**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 2027, the estimated contribution is \$1,150,328.

**Unassigned General Fund** – After the Emergency Recovery Fund balance is achieved, an unassigned balance for the fiscal year should be 35% of the budgeted operating General Fund expenditures. Use of unassigned fund balance should be limited to one-time non-recurring costs. For Fiscal Year 2027, the estimated balance is \$12,138,694.

**SECTION 9. COMPENSATION OF COUNCILMEMBERS**

The mayor compensation shall remain at \$35,000 and councilmember compensation shall remain at \$25,000. The last increase in compensation was approved in Fiscal Year 2026.

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, 2026.

**PASSED, APPROVED, AND ADOPTED BY THE COUNCIL FOR THE TOWN OF BLUFFTON ON THIS \_\_\_\_\_ DAY OF \_\_\_\_\_, 2026.**

\_\_\_\_\_  
Larry C. 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 12, 2026

Public Hearing and Second and Final Reading: June 9, 2026



**Town of Bluffton  
General Fund Budget**

	Revised FY 2026 Budget	Proposed FY 2027 Budget	\$ Budget Change	% of Budget Change
<b>Revenues</b>				
<b>Property Taxes</b>	\$ 11,203,000	\$ 11,556,000	\$ 353,000	3.2%
<b>Licenses &amp; Permits</b>				
Business Licenses	4,163,400	5,000,000	836,600	20.1%
Franchise Fees	3,358,000	4,000,000	642,000	19.1%
MASC Insurance Tax Collection	4,697,000	5,400,000	703,000	15.0%
MASC Telecommunications	48,000	45,000	(3,000)	-6.3%
Building Safety Permits	1,704,259	2,241,372	537,113	31.5%
Application Fees	60,000	60,000	-	0.0%
Total Licenses & Permits	14,030,659	16,746,372	2,715,713	19.4%
<b>Grants and Entitlements</b>	1,476,460	1,587,354	110,894	7.5%
<b>Intergovernmental</b>	484,688	702,862	218,174	45.0%
<b>Service Revenues</b>	748,000	697,800	(50,200)	-6.7%
<b>Fines &amp; Fees</b>	115,000	115,000	-	0.0%
<b>Interest Income</b>	300,000	500,000	200,000	66.7%
<b>Miscellaneous Revenues</b>	703,472	703,472	-	0.0%
<b>Sub-Total Revenues</b>	<u>29,061,279</u>	<u>32,608,860</u>	<u>3,547,581</u>	<u>12.2%</u>
<b>Other Financing Sources</b>				
<b>Transfers In</b>				
Hospitality Tax	3,241,133	3,245,219	4,086	0.1%
Local Accommodations Tax	533,489	670,200	136,711	25.6%
State Accommodations Tax	79,894	79,346	(548)	-0.7%
Stormwater Fund	465,411	774,538	309,127	66.4%
General Fund Prior Year Fund Balance (PYFB)	3,730,537	4,746,728	1,016,191	27.2%
General Fund PYFB - Capital Asset Reserve	1,210,684	947,176	(263,508)	-21.8%
Total Transfers In	9,261,148	10,463,207	1,202,059	13.0%
<b>Total Other Financing Sources &amp; Transfers In</b>	<u>9,261,148</u>	<u>10,463,207</u>	<u>1,202,059</u>	<u>13.0%</u>
<b>Total Revenues and Other Financing Sources</b>	<u>\$ 38,322,427</u>	<u>\$ 43,072,067</u>	<u>\$ 4,749,640</u>	<u>12.4%</u>
<b>Expenditures</b>				
Building Safety	\$ 1,080,427	\$ 1,008,863	\$ (71,564)	-6.6%
Communications	478,211	530,750	52,539	11.0%
Customer Service	284,031	244,402	(39,629)	-14.0%
Economic Development: DRCI	486,487	445,663	(40,824)	-8.4%
Events & Venues	864,561	1,080,625	216,064	25.0%
Executive	1,999,914	2,241,172	241,258	12.1%
Finance & Administration	1,321,174	1,373,433	52,259	4.0%
Human Resources	685,146	785,844	100,698	14.7%
Information Technology	2,475,273	2,641,702	166,429	6.7%
Municipal Court	518,706	523,883	5,177	1.0%
Municipal Judges	110,869	112,328	1,459	1.3%
Planning & Community Development	1,898,467	1,253,515	(644,952)	-34.0%
Police	11,788,703	11,685,423	(103,280)	-0.9%
Project Management	865,004	900,333	35,329	4.1%
Public Services	3,711,166	4,170,388	459,222	12.4%
Town Council	256,762	253,624	(3,138)	-1.2%
Townwide (Non-Departmental)	4,342,810	5,430,037	1,087,227	25.0%
<b>Total Expenditures</b>	<u>33,167,711</u>	<u>34,681,985</u>	<u>1,514,274</u>	<u>4.6%</u>
<b>Other Funding Uses</b>				
Transfers Out to Capital Improvements Program Fund	5,154,716	8,390,082	3,235,366	62.8%
<b>Total Transfers</b>	<u>5,154,716</u>	<u>8,390,082</u>	<u>3,235,366</u>	<u>62.8%</u>
<b>Total Expenditures and Other Funding Uses</b>	<u>\$ 38,322,427</u>	<u>\$ 43,072,067</u>	<u>\$ 4,749,640</u>	<u>12.4%</u>



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

Section IX. Item #1.  
 Attached

	Revised FY 2026 Budget	Proposed FY 2027 Budget	\$ Budget Change	% Budget Change
<b>Revenues</b>				
Taxes	\$ 4,161,955	\$ 4,172,605	\$ 10,650	0.3%
Interest Income	100,000	150,000	50,000	50.0%
<b>Sub-Total Revenues</b>	<u>4,261,955</u>	<u>4,322,605</u>	<u>60,650</u>	<u>1.4%</u>
<b>Other Financing Sources</b>				
Transfers In	-	-	-	
Prior Year Fund Balance	4,677,029	4,339,986	(337,043)	-7.2%
<b>Total Other Financing Sources &amp; Transfers In</b>	<u>4,677,029</u>	<u>4,339,986</u>	<u>(337,043)</u>	<u>-7.2%</u>
<b>Total Revenues and Other Financing Sources</b>	<u>\$ 8,938,984</u>	<u>\$ 8,662,591</u>	<u>\$ (276,393)</u>	<u>-3.1%</u>
<b>Expenditures</b>				
<b>Other Funding Uses</b>				
Transfers Out to Capital Improvements Program Fund	\$ 5,697,851	\$ 5,417,372	\$ (280,479)	-4.9%
Transfers Out to General Fund	3,241,133	3,245,219	4,086	0.1%
<b>Total Transfers</b>	<u>8,938,984</u>	<u>8,662,591</u>	<u>(276,393)</u>	<u>-3.1%</u>
<b>Total Expenditures and Other Funding Uses</b>	<u>\$ 8,938,984</u>	<u>\$ 8,662,591</u>	<u>\$ (276,393)</u>	<u>-3.1%</u>



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

Attach Section IX. Item #1.

	Revised FY 2026 Budget	Proposed FY 2027 Budget	\$ Budget Change	% Budget Change
<b>Revenues</b>				
Taxes	\$ 1,297,792	\$ 1,630,324	\$ 332,532	25.6%
Interest Income	25,000	19,000	\$ (6,000)	-24.0%
Sub-Total Revenues	1,322,792	1,649,324	326,532	24.7%
<b>Other Financing Sources</b>				
Transfers In	-	-	-	
Prior Year Fund Balance	1,497,695	2,446,405	948,710	63.3%
Total Other Financing Sources & Transfers In	1,497,695	2,446,405	948,710	63.3%
<b>Total Revenues and Other Financing Sources</b>	\$ 2,820,487	\$ 4,095,729	\$ 1,275,242	45.2%
<b>Expenditures</b>				
<b>Other Funding Uses</b>				
Transfers Out to Capital Improvements Program Fund	\$ 2,286,998	\$ 3,425,529	\$ 1,138,531	49.8%
Transfers Out to General Fund	533,489	670,200	136,711	25.6%
Total Transfers	2,820,487	4,095,729	1,275,242	45.2%
<b>Total Expenditures and Other Funding Uses</b>	\$ 2,820,487	\$ 4,095,729	\$ 1,275,242	45.2%



**Town of Bluffton  
Stormwater Fund Budget**

Section IX. Item #1.

	Revised FY 2026 Budget	Proposed FY 2027 Budget	\$ Budget Change	% Budget Change
<b>Revenues</b>				
<b>Stormwater Utility Fee</b>	\$ 2,267,492	\$ 2,312,842	\$ 45,350	2.0%
<b>Licenses &amp; Permits</b>				
NPDES Plan Review and Inspection Fees	400,000	400,000	-	0.0%
Total Licenses & Permits	400,000	400,000	-	0.0%
<b>Grants and Entitlements</b>	287,625	-	(287,625)	-100.0%
<b>Interest Income</b>	-	25,000	25,000	100.0%
<b>Sub-Total Revenues</b>	2,955,117	2,737,842	(217,275)	-7.4%
<b>Other Financing Sources</b>				
<b>Transfers In</b>				
Prior Year Fund Balance	2,867,426	2,680,846	(186,580)	-6.5%
<b>Total Other Financing Sources &amp; Transfers In</b>	2,867,426	2,680,846	(186,580)	-6.5%
<b>Total Revenues and Other Financing Sources</b>	\$ 5,822,543	\$ 5,418,688	\$ (403,855)	-6.9%
<b>Expenditures</b>				
Watershed Resiliency	\$ 4,574,610	\$ 3,761,066	\$ (813,544)	-17.8%
<b>Total Expenditures</b>	4,574,610	3,761,066	(813,544)	-17.8%
<b>Other Funding Uses</b>				
Transfers Out to Capital Improvements Program Fund	489,722	588,784	99,062	20.2%
Transfers Out to General Fund	465,411	774,538	309,127	66.4%
Transfer to Debt Service	292,800	294,300	1,500	0.5%
<b>Total Transfers</b>	1,247,933	1,657,622	409,689	32.8%
<b>Total Expenditures and Other Funding Uses</b>	\$ 5,822,543	\$ 5,418,688	\$ (403,855)	-6.9%



**Town of Bluffton  
Capital Improvements Project Fund**

	Revised FY 2026 Budget	Proposed FY 2027 Budget	\$ Budget Change	% Budget Change
<b>Revenues</b>				
Licenses & Permits	\$ 317,000	\$ 317,000	\$ -	0.0%
Grants and Entitlements	1,244,816	1,000,000	(244,816)	-19.7%
Intergovernmental	4,422,990	232,990	(4,190,000)	-94.7%
<b>Total Revenues</b>	<b>5,984,806</b>	<b>1,549,990</b>	<b>(4,434,816)</b>	<b>-74.1%</b>
<b>Other Financing Sources</b>				
Transfers In	-	-	-	
Hospitality Tax	5,697,851	5,417,372	(280,479)	-4.9%
Local Accommodations Tax	2,286,998	3,425,529	1,138,531	49.8%
State Accommodations Tax	164,681	162,588	(2,093)	-1.3%
Stormwater Fund	489,722	588,784	99,062	20.2%
TIF	8,804,906	11,211,269	2,406,363	27.3%
General Fund	5,154,716	8,390,082	3,235,366	62.8%
CIP Fund Balance	13,536,905	8,465,266	(5,071,639)	-37.5%
<b>Total Other Financing Sources &amp; Transfers In</b>	<b>36,135,779</b>	<b>37,660,890</b>	<b>1,525,111</b>	<b>4.2%</b>
<b>Total Revenues and Other Financing Sources</b>	<b>\$ 42,120,585</b>	<b>\$ 39,210,880</b>	<b>\$ (2,909,705)</b>	<b>-6.9%</b>
<b>Expenditures</b>				
Economic Development Projects	\$ 1,003,086	\$ 1,098,948	\$ 95,862	9.6%
Facilities Projects	3,465,436	4,789,983	1,324,547	38.2%
Housing Projects	1,230,396	1,945,325	714,929	58.1%
Information Technology Infrastructure Projects	200,912	40,603	(160,309)	-79.8%
Land Acquisition	13,669,302	11,600,000	(2,069,302)	-15.1%
Park Projects	8,287,924	6,415,261	(1,872,663)	-22.6%
Road Projects	5,769,415	7,184,948	1,415,533	24.5%
Stormwater and Sewer Projects	8,177,114	5,818,812	(2,358,302)	-28.8%
<b>Total Project Expenditures</b>	<b>41,803,585</b>	<b>38,893,880</b>	<b>(2,909,705)</b>	<b>-7.0%</b>
<b>Other Funding Uses</b>				
Contribution to Fund Balance	317,000	317,000	-	0.0%
<b>Total Other Funding Uses</b>	<b>317,000</b>	<b>317,000</b>	<b>-</b>	<b>0.0%</b>
<b>Total Expenditures and Other Funding Uses</b>	<b>\$ 42,120,585</b>	<b>\$ 39,210,880</b>	<b>\$ (2,909,705)</b>	<b>-6.9%</b>



**Town of Bluffton  
Debt Service Fund Budget**

	Revised FY 2026 Budget	Proposed FY 2027 Budget	\$ Budget Change	% Budget Change
<b>Revenues</b>				
<b>Property Taxes</b>				
Real & Personal Property Tax (TIF)	\$ 4,744,142	\$ 5,357,587	\$ 613,445	12.9%
GO Bond Debt Service Property Tax	577,005	588,545	11,540	2.0%
Total Property Tax	<u>5,321,147</u>	<u>5,946,132</u>	<u>624,985</u>	<u>11.7%</u>
<b>Licenses &amp; Permits</b>				
Municipal Improvement District Fee	390,970	390,970	-	0.0%
<b>Interest Income</b>				
	50,000	50,000	-	0.0%
<b>Sub-Total Revenues</b>	<u>5,762,117</u>	<u>6,387,102</u>	<u>624,985</u>	<u>10.8%</u>
<b>Transfers In</b>				
Stormwater Fund	292,800	294,300	1,500	0.5%
Prior Year Fund Balance	4,994,753	6,772,631	1,777,878	35.6%
<b>Total Other Financing Sources &amp; Transfers In</b>	<u>5,287,553</u>	<u>7,066,931</u>	<u>1,779,378</u>	<u>33.7%</u>
<b>Total Revenues and Other Financing Sources</b>	<u>\$ 11,049,670</u>	<u>\$ 13,454,033</u>	<u>\$ 2,404,363</u>	<u>21.8%</u>
<b>Expenditures</b>				
<b>Series 2014 TIF Bonds Debt Service</b>				
Principal	\$ 919,815	\$ -	\$ (919,815)	-100.0%
Interest	11,866	-	(11,866)	-100.0%
<b>Series 2022 TIF Bonds Debt Service</b>				
Principal	338,887	1,282,293	943,406	278.4%
Interest	302,046	290,321	(11,725)	-3.9%
<b>Series 2020 GO Bonds Debt Service</b>				
Principal	270,000	280,000	10,000	3.7%
Interest	109,300	95,800	(13,500)	-12.4%
<b>Series 2020A GO Bonds Debt Service (Projects)</b>				
Principal	170,000	180,000	10,000	5.9%
Interest	122,800	114,300	(8,500)	-6.9%
<b>Miscellaneous</b>	50	50	-	0.0%
<b>Sub-Total Expenditures</b>	<u>2,244,764</u>	<u>2,242,764</u>	<u>(2,000)</u>	<u>-0.1%</u>
<b>Other Funding Uses</b>				
Transfers Out to Capital Improvements Program Fund	8,804,906	11,211,269	2,406,363	27.3%
<b>Total Transfers</b>	<u>8,804,906</u>	<u>11,211,269</u>	<u>2,406,363</u>	<u>27.3%</u>
<b>Total Expenditures and Other Funding Uses</b>	<u>\$ 11,049,670</u>	<u>\$ 13,454,033</u>	<u>\$ 2,404,363</u>	<u>21.8%</u>



Town of Bluffton  
Consolidated Budget

	Revised FY 2026 Budget	Proposed FY 2027 Budget	\$ Budget Change	% of Budget Change
<b>Revenues</b>				
Property Taxes	\$ 16,524,147	\$ 17,502,132	\$ 977,985	5.9%
Local Hospitality & Accommodations Taxes	5,459,747	5,802,929	343,182	6.3%
Licenses & Permits	17,406,121	20,167,184	2,761,063	15.9%
Grants & Entitlements	3,008,901	2,587,354	(421,547)	-14.0%
Intergovernmental	4,907,678	935,852	(3,971,826)	-80.9%
Service Revenues	748,000	697,800	(50,200)	-6.7%
Fines & Fees	115,000	115,000	-	0.0%
Interest Income	475,000	744,000	269,000	56.6%
Miscellaneous Revenues	703,472	703,472	-	0.0%
<b>Sub-Total Revenues</b>	<b>49,348,066</b>	<b>49,255,723</b>	<b>(92,343)</b>	<b>-0.2%</b>
<b>Other Financing Sources</b>	<b>-</b>	<b>-</b>	<b>-</b>	
Transfers In	59,726,630	64,658,265	4,931,635	8.3%
<b>Total Other Financing Sources &amp; Transfers In</b>	<b>59,726,630</b>	<b>64,658,265</b>	<b>4,931,635</b>	<b>8.3%</b>
<b>Total Revenues and Other Financing Sources</b>	<b>\$ 109,074,696</b>	<b>\$ 113,913,988</b>	<b>\$ 4,839,292</b>	<b>4.4%</b>
<b>Expenditures</b>				
Building Safety	\$ 1,080,427	\$ 1,008,863	\$ (71,564)	-6.6%
Communications	478,211	530,750	52,539	11.0%
Customer Service	284,031	244,402	(39,629)	-14.0%
Economic Development	486,487	445,663	(40,824)	-8.4%
Events & Venues	864,561	1,080,625	216,064	25.0%
Executive	1,999,914	2,241,172	241,258	12.1%
Finance & Administration	1,321,174	1,373,433	52,259	4.0%
Human Resources	685,146	785,844	100,698	14.7%
Information Technology	2,475,273	2,641,702	166,429	6.7%
Municipal Court	518,706	523,883	5,177	1.0%
Municipal Judges	110,869	112,328	1,459	1.3%
Planning & Community Development	1,898,467	1,253,515	(644,952)	-34.0%
Police	11,788,703	11,685,423	(103,280)	-0.9%
Project Management	865,004	900,333	35,329	4.1%
Public Services	3,711,166	4,170,388	459,222	12.4%
Town Council	256,762	253,624	(3,138)	-1.2%
Townwide (Non-Departmental)	4,342,810	5,430,037	1,087,227	25.0%
Watershed Management	4,574,610	3,761,066	(813,544)	-17.8%
Capital Projects	41,803,585	38,893,880	(2,909,705)	-7.0%
Debt Service	2,244,764	2,242,764	(2,000)	-0.1%
<b>Sub-Total Expenditures</b>	<b>81,790,670</b>	<b>79,579,696</b>	<b>(2,210,974)</b>	<b>-2.7%</b>
<b>Other Funding Uses</b>				
Contribution to Fund Balance	317,000	317,000	-	0.0%
Transfers Out	26,967,026	34,017,293	7,050,267	26.1%
<b>Total Other Funding Uses &amp; Transfers Out</b>	<b>27,284,026</b>	<b>34,334,293</b>	<b>7,050,267</b>	<b>25.8%</b>
<b>Total Expenditures and Other Funding Uses</b>	<b>\$ 109,074,696</b>	<b>\$ 113,913,988</b>	<b>\$ 4,839,292</b>	<b>4.4%</b>

# Master Fee Schedule – FY2027 PROPOSED

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# Master Fee Schedule – FY2027 PROPOSED

## Section I – Miscellaneous Fees

Item/Description	Basis	Fee
<b>Printing, Reproduction, Documents</b>		
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
<b>FOIA Requests</b>		
Staff Time (no less than a 30-minute charge) If staff time is estimated to be more than two (2) hours, a 50% deposit will be required	Per Hour	\$25.00
<b>Election Fees</b>		
To Elect Council	Per Election	\$100.00
To Elect Mayor	Per Election	\$150.00
<b>Finance Fees</b>		
NSF Returned Check Fee	Per Check	\$30.00
<b>Old Town Business Directional Sign Fees</b>		
Sign Production & Installation	Per Sign	At Cost

## Section II – Police Department Fees

Item/Description	Basis	Fee
<b>Police Services</b>		
Off-Duty Police Officer	Per Hour, Per Officer	\$60.00
<b>Police Reports, Photocopies &amp; Records</b>		
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
For media too large for CD/DVD	CD/DVD	\$5.00
	USB Thumb Drive	\$20.00
<b>Police Permits</b>		
Precious Metal Permit	Allowed by State Law	\$50.00

# Master Fee Schedule – FY2027 PROPOSED

## Section III – Business License Fees

Item/Description	Basis	Fee
<b>Taxation Fees</b>		
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

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**

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.

Item/Description	Basis	Fee
<b>Other Business License Fees</b>		
Annual Mobile Vending Fee	Paid Annually in addition to Business License Tax	\$50
Guided Tours		TBD
Short Term Rental Fee		\$325

# Master Fee Schedule – FY2027 PROPOSED

## Section III – Business License Fees (continued)

Item/Description	Basis	Fee
<b>Penalty Fees</b>		
Penalties – Business License, Hospitality Tax, and Accommodations Tax	Per Month	5% per month
Penalty for Operating without a Mobile Vending Permit and/or Short Term Rental Permit		Sec 1-7 of Town Code

## Special Events

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

## Section IV – Facility Rental Fees

Rental Location	Daily Rates		
	Resident	Non-Resident	Meeting
<b>Facilities</b>			
Reservation Security Deposit charged at Facility's Resident Daily Rate	See Below	Same as Resident Rate	n/a
Facility Cleaning Fee	\$200	\$200	\$100
Lost Key/Fob Fee	\$25	\$25	\$25
New Riverside Barn	\$2,000	\$4,000	n/a
Rotary Community Center	\$500	\$1,500	\$50/hr.
<b>Parks</b>			
Park Reservation Security Deposit	\$200	\$200	n/a
Buckwalter Amphitheater Park (Park B)	\$1,000	\$2,000	n/a
Buckwalter Veterans Park (Park A)	\$250	\$500	n/a
Field of Dreams	\$250	\$500	n/a
Martin Family Park	\$250	\$500	n/a
New Riverside Lawn	\$800	\$1,600	n/a
Oyster Factory Park (East)	\$800	\$1,600	n/a
Oyster Factory Park (West)	\$400	\$800	n/a
Wright Family Park	\$600	\$1,200	n/a
<b>Security by Bluffton Police Officer</b>	\$60/hour	\$60/hour	n/a
<b>Notes:</b>	<ul style="list-style-type: none"> <li>Person making the reservation must be present and accessible on site for the duration of the event</li> <li>No one person shall be granted more than four (4) rentals total per calendar year</li> <li>Reservations Monday – Thursday receives a 25% discount</li> </ul>		

# Master Fee Schedule – FY2027 PROPOSED

- Resident rate applies to persons living within Town limits, property owners within Town limits (residential or business) and non-profits licensed with the Town of Bluffton; all others shall be charged the Non-Resident rates
- Meeting fees may be waived at the discretion of the Town Manager or their designee.
- Security Deposit may be refunded provided the rented space is returned to its original condition.
- A full refund of the Rental Fee and Security Deposit for Parks will be granted with a cancellation notice of at least forty-eight (48) hours prior to the scheduled rental date or if an event is rained out and the park is not utilized.
- A full refund of the Rental Fee and Security Deposit for Facilities will be granted with a cancellation notice of at least thirty (30) days prior to the scheduled rental date.

## 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 (includes swimming pool or spa construction and installations)	\$50,000 and above	\$500.00 + \$4.50 per \$1,000 or fraction thereof over \$50,000
Miscellaneous Construction Residential (includes swimming pool or spa construction and installations)	\$50,000 and above	\$500.00 + \$4.00 per \$1,000 or fraction thereof over \$50,000
	Each	75% of permit fee (non-refundable)
Multi-Family and Commercial Plans Check Fee	Each	50% of permit fee (non-refundable)
Residential Plans Check Fee		

# Master Fee Schedule – FY2027 PROPOSED

Item/Description	Basis (Value of Construction)	Fee
<b>Application Fees</b>		
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
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 <sup>th</sup> copy of Building Plans for Remarking/Rechecking of Single-Family Plans at Time of Initial Submittal	Each	\$25.00
<b>Residential Revision</b>	<b>Each</b>	<b>\$50 or the applicable application fee based on the value of the change, whichever is greater.</b>
<b>Commercial Plan Remarking</b>	<b>Each</b>	<b>\$200.00</b>
<b>Commercial Revision</b>	<b>Each</b>	<b>\$200 or the applicable application fee based on the value of the change, whichever is greater.</b>
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"> <li>• Waiver of Fees.                             <ul style="list-style-type: none"> <li>○ 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.</li> </ul> </li> </ul>		

# Master Fee Schedule – FY2027 PROPOSED

- 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.
- 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 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:		

# Master Fee Schedule – FY2027 PROPOSED

Preliminary	Each	\$750.00
Final	Each	\$1,000.00
Amendment	Each	\$750.00
Extension	Each	\$300.00
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
Development Surety	Each	\$100.00
Emergency Permitting	Each	\$0.00
HD Signage and Site Features	Each	\$50.00
Exempt Plat	Each	\$50.00

## Section VI – Growth Management Fees (continued)

### 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 – FY2027 PROPOSED

## 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
<b>Additional Notes:</b>		
<ul style="list-style-type: none"> <li>Town Council may waive any or all fees for applications if it is deemed in the best interest of the Town.</li> <li>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.</li> <li>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.</li> <li>Building Permit and Business License Application Fees include the Zoning Permit Application Fee therefore; no additional fee is necessary.</li> </ul>		

### Developmental Agreement Fees

Item/Description	Basis	Fee
<del>Bluffton Village</del>		
<del>Commercial, Retail, and Multi-Family Space</del>		<del>Fee Per Development Agreement</del>
<del>Individual Dwelling Units</del>		<del>Fee Per Development Agreement</del>
<del>Dependency Units</del>		<del>Fee Per Development Agreement</del>
<del>Boat Ramp Fee (per dwelling units)</del>	<del>Each</del>	<del>\$25.00</del>
<b>Buckwalter</b>		
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 bedrooms		Fee Per Development Agreement
Multi-Family (MF) – 3 bedrooms		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

Section VI – Growth Management Fees (continued)

**Developmental Agreement Fees (continued)**

<p><b>Jones Estate</b>                      Single Family Residential (SFR)                      Affordable Housing &lt; \$124,000                      SFR &lt; 2,000 sq. ft.                      SFR &gt; 2,000 sq. ft. to 3,000 sq. ft.                      SFR &gt; 3,000 sq. ft.                      Multi-Family (MF) – 1 bedroom                      Multi-Family (MF) – 2 bedrooms                      Multi-Family (MF) – 3 bedrooms                      Commercial Development                      Municipal Improvement Development Fee –                          All Residential Units Within: Cypress Ridge                      Boat Ramp Fee (per dwelling units)</p>	<p>Each                      Each</p>	<p>Fee Per Development Agreement                      Fee Per Development Agreement                      Fee Per Development Agreement                      Fee Per Development Agreement                      Fee Per Development Agreement                      Fee Per Development Agreement                      Fee Per Development Agreement                      Fee Per Development Agreement                      \$900.00                      \$25.00</p>
<p><b>Schultz Tract, New Riverside, Palmetto Bluff</b>                      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)</p>	<p>Each                      Each</p>	<p>Fee Per Development Agreement                      Fee Per Development Agreement                      Fee Per Development Agreement                      \$900.00                      \$25.00</p>
<p><b>Village at Verdier Plantation</b>                      Single Family Residential (SFR) &lt; 1,800 sq. ft.                      SFR 1,801 – 2,400 sq. ft.                      SFR 2,401 – 3,000 sq. ft.                      SFR &gt; 3,000 sq. ft.                      Multi-Family (MF) – 1 bedroom                      Multi-Family (MF) – 2 bedrooms                      Multi-Family (MF) – 3 bedrooms                      Commercial Development                      Boat Ramp Fee (per dwelling units)</p>	<p>Each</p>	<p>Fee Per Development Agreement                      Fee Per Development Agreement                      Fee Per Development Agreement                      Fee Per Development Agreement                      Fee Per Development Agreement                      Fee Per Development Agreement                      Fee Per Development Agreement                      Fee Per Development Agreement                      \$25.00</p>
<p>Additional Notes:</p> <ul style="list-style-type: none"> <li>• Town Council may waive any or all fees if it is deemed in the best interests of the Town.</li> </ul>		

Section VII – Stormwater Management Fees

**Residential Land Uses**

Residential Type	Factor	Fee
<b>Administrative Fee</b>		\$5.00
<b>Impervious Area Units (IA)</b>		\$85.00
Tier 1 – Single Family Unit ≤ 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 ≥ 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	
<b>Gross Area Charge (GA)</b>		\$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	
<b>Town of Bluffton SWU</b>		\$115.00
The formula is as follows: Calculation of Tier 1 Single Family Units on less than 2 acres: $\$85 * .5 = \$42.50 + \$25.00 + \$5.00 = \$72.50$ Calculation Example of Tier 3 Single Family Unit with GA of 7 acres: $\$127.50 + 25.00 + ((7-2) * .5 * 25 = 62.50) + 5.00 = \$215.00$ 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.		

**National Pollutant Discharge Elimination System (NPDES) Fees**

Item/Description	Fee
<b>Stormwater Plan Review Fee</b>	
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)
<b>Stormwater Plan Amendment/Resubmittal Fee</b>	
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)
<b>Stormwater Surety (each)</b>	\$100.00

Section VII – Stormwater Management Fees (continued)

**National Pollutant Discharge Elimination System (NPDES) Inspection Fees**

Item/Description	# of Acres	Fee
<b>Erosion Control Inspection Fees</b>		
Residential <1 acre (not part of subdivision)		\$150.00 /inspection
Residential (single family or subdivision), Multi-family, or Non-Residential per disturbed acer (round up to the next whole acre)	0.0-0.99 acres	\$150.00/inspection
	1.0-5.0 acres	\$250.00/inspection
	5.01-10 acres	\$350.00/inspection
	10.01+ acres	\$450.00/inspection
<b>Re-Inspection Resulting for Notice of Violation Fee</b>		
Residential <1 acre (not part of subdivision)		\$200.00 /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	\$200.00
	1.0-5.0 acres	\$300.00
	5.01-10 acres	\$400.00
	10.01+ acres	\$500.00
<b>Re-Inspection Resulting from Stop Work Order (SWO)</b>		
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	\$200
	1.0-5.0 acres	\$300
	5.01-10 acres	\$400
	10.01+ acres	\$500
<b>Waiver Request</b>		
Residential <1 acre (not part of subdivision)		Exempt
Residential (single family or subdivision), Multi-family, or Non-residential		\$350.00
<b>Notice of Termination (NOT) Fees</b>		
Notice of Termination (NOT) Review		\$100.00
Notice of Termination (NOT) Resubmittal Review		\$50.00
Notice of Termination (NOT) 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) 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

# Master Fee Schedule – **FY2027 PROPOSED**

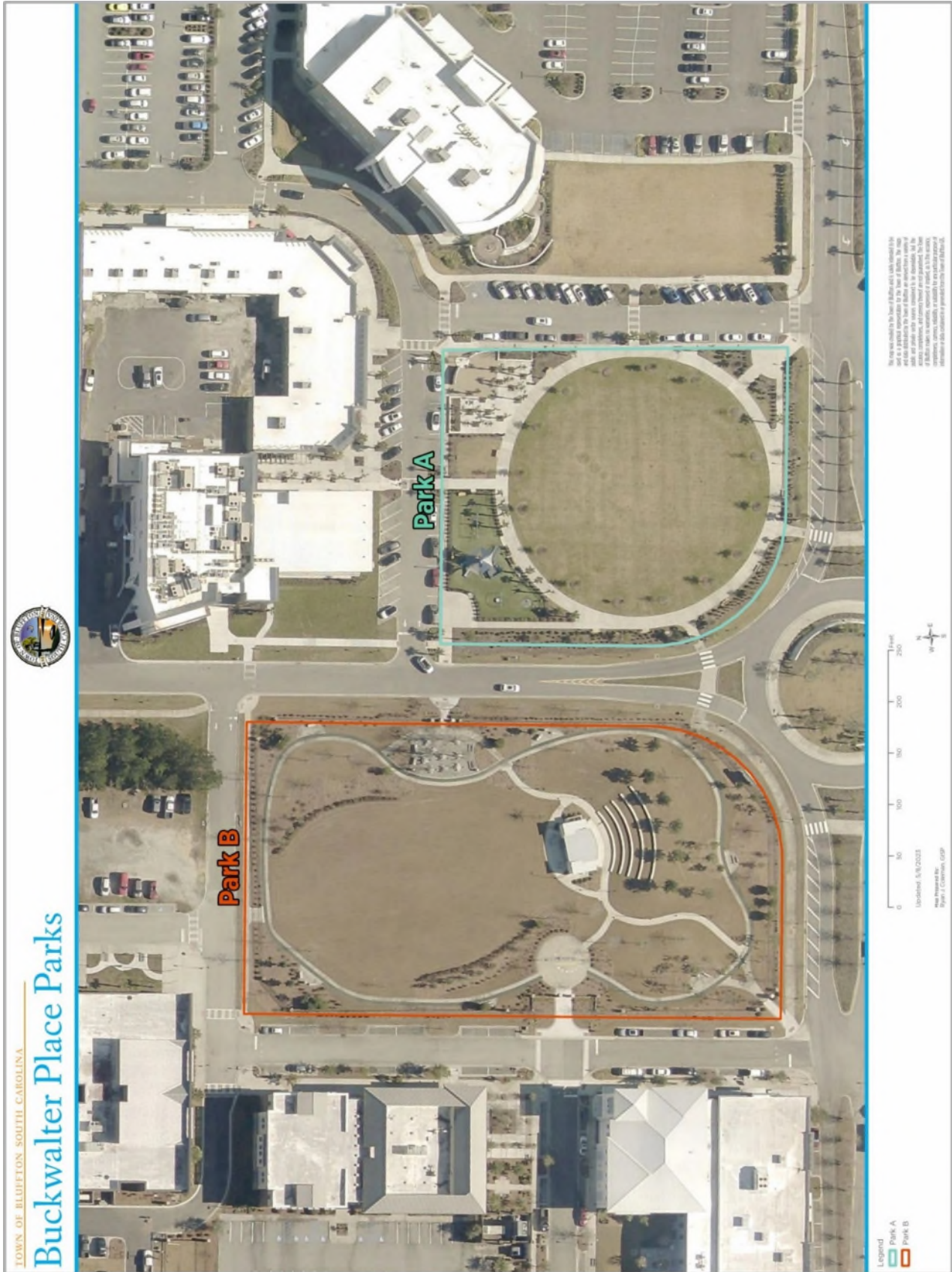
## Section VII – Stormwater Management Fees (continued)

### Stormwater Fee-In-Lieu (FIL)

Item/Description	Fee
<b>Fee-In-Lieu (FIL)</b> For projects with an approved Maximum Extent Practicable (MEP) submittal, the FIL amount is calculated based on an applicant's shortfall, in cubic feet (CF), of the required Stormwater Retention Volume (SWRv).	\$151.92/CF of SWRv

DRAFT

### Buckwalter Place Commerce Park, Park A and Park B





# Town of Bluffton Economic Development Incentive Grant :



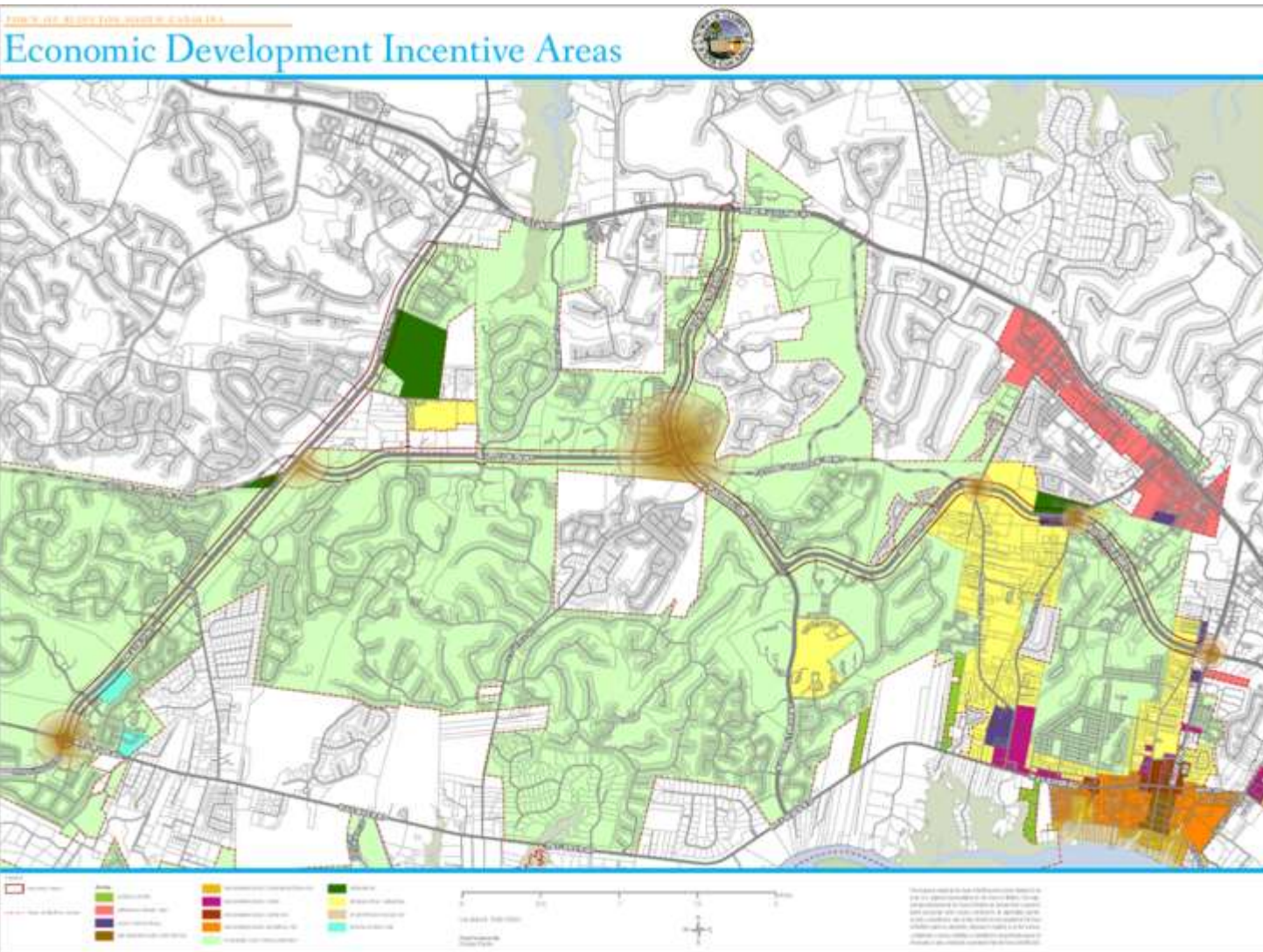
## *Second and Final Reading*

Paul Arvantides, DRCI

June 09, 2026



# Background



- Economic Development Incentive Ordinance passed September 12, 2023.
- SC 170, Buckwalter Pkwy and Bluffton Pkwy incentive areas.
- Targeted business purposes:
  - Healthcare, dental, home health, pharmaceutical, childcare, affordable housing, mixed use commercial / flex space and corporate headquarters.



# Grant Overview

- Eligible Developments and Businesses could receive:
  - Permit / Development Fees = Up to 50%
  - BJWSA Capacity Fees = Up to 100%
  - Business License Fees = Up to 50% for up to five years
  - Other incentives determined by Council on a case-by-case basis.
- Staff Recommended Eligibility Matrix

New Jobs	or	Minimum Capital Investments	Eligible Grant Percentages		
			Permit Fees	BJWSA Capacity Fees	Business License Fees
5		\$500,000	10%	20%	50% (1 Year)
10		\$750,000	15%	30%	50% (2 Year)
15		\$1,000,000	20%	50%	50% (3 Year)
20		\$1,500,000	35%	75%	50% (4 Year)
25+		\$2,000,000+	50%	100%	50% (5 Year)







# Proposal Summary



- 3,000 square feet of commercial space located at 65 Innovation Drive.
- \$367,000 Investment
- 15 jobs over five years
- Average salary \$73,070
- FAA-ODA designation would be the first of its kind in South Carolina, further elevating Bluffton's role in the aerospace sector.



 <b>FAA CERTIFIED</b> Our FAA certified helicopter engineers and technicians complete thorough training before any maintenance.	 <b>SAFETY FIRST</b> Count on our exceptional service and precision to keep you safe.
 <b>24/7 HELICOPTER AOG</b> Our 24-hour accessibility and timely responses help provide you with minimal downtime.	 <b>FAA CERTIFIED</b> Our FAA certified technicians complete thorough training before any maintenance.



# Motion

**“I make a motion to (approve/deny/modify) the second and final reading of an Ordinance Authorizing the Town Manager to enter into an Economic Development Grant Agreement between the Town of Bluffton and Sterling Helicopter”**

# TOWN COUNCIL

## STAFF REPORT



<b>MEETING DATE:</b>	June 9, 2026
<b>PROJECT:</b>	Consideration of a Resolution to Install a 4-way Stop Sign at the Intersection of Boundary and Lawrence Streets
<b>PROJECT MANAGER:</b>	Stephen Steese Town Manager

### **RECOMMENDATION:**

Town Council approve the Resolution presented as Attachment 1, approving the installation of a 4-way stop sign, more formally referred to as an 'allway stop control' at the intersection of Boundary and Lawrence Streets.

### **DISCUSSION:**

Town Council approved 'The Boundary Street Streetscape Project' as an agenda action item in the Strategic Plan for FY 2027-2028, approved on April 7<sup>th</sup>, 2026. This project includes improvements to parking, curbing, walkways, crosswalks, utility relocations, drainage improvements, lighting and traffic calming measures inside and adjacent to the Boundary Street right of way.

The proposed stop sign was recommended as a safety and traffic calming measure during the planning process to prepare to bid for the project later this year. This intersection was identified in the analysis stage of the project as an intersection in need of traffic control.

The Town owns both Boundary (2021) and Lawrence Street, therefore, no additional approvals are required prior to the installation of the signs. The intersection would also serve as a parallel to the 4-way stop at the Calhoun and Lawrence Street intersection.

### **NEXT STEPS:**

Prior to the contract award and start of the Boundary Street streetscape project, should Town Council approve the attached resolution, staff will install the 4 stop signs with appropriate pavement markings as shown in Attachment 1a to the proposed Resolution.

### **ATTACHMENTS:**

1. Resolution to support the installation of a 4-way stop sign
2. Current site conditions
3. Proposed motion to adopt the Resolution

**RESOLUTION**

**A RESOLUTION TO INSTALL 4-WAY STOP SIGNS AT THE INTERSECTION OF BOUNDARY AND LAWRENCE STREETS**

**WHEREAS,** the Town of Bluffton Town Council (the "Town Council") has approved numerous plans that support the community’s health, safety, and community character; and

**WHEREAS,** the Old Town Master Plan approved in 2006 explicitly calls for walkability-first design, traffic calming, crosswalks, and stop signs as tools to improve pedestrian safety; and

**WHEREAS,** the Comprehensive Plan, *Blueprint Bluffton 2020*, prioritizes pedestrian crossing improvements at intersections and Complete Streets policies; and

**WHEREAS,** the Town’s Strategic Plans (FY19–26) consistently identify pedestrian safety in the Historic District as a priority under Community Quality of Life and Infrastructure focus areas; and

**WHEREAS,** the Boundary Street Streetscape Capital Improvement project specifically includes traffic-calming measures along Boundary Street and its intersections, including Lawrence Street.

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

Section 1. Town Council hereby approves the installation of stops signs at the intersection of Boundary and Lawrence Streets and attached to this Resolution as Exhibit "A" and incorporated herein by reference.

**THIS RESOLUTION SHALL BE EFFECTIVE IMMEDIATELY UPON ADOPTION, SIGNED, SEALED AND DELIVERED AS OF THIS \_\_\_\_\_ DAY OF \_\_\_\_\_, 2026.**

\_\_\_\_\_  
Larry C. Toomer, Mayor  
Town of Bluffton, South Carolina

**ATTEST:**

\_\_\_\_\_  
Marcia Hunter, Town Clerk  
Town of Bluffton, South Carolina



MARTIN FAMILY PARK

PLAYGROUND

DUBOIS PARK

NEW SIDEWALK (TYP.)

EXISTING SIDEWALK (TYP.)

N/F TOWN OF BLUFFTON

LAWRENCE STREET

SEATING AREA

N/F TOWN OF BLUFFTON

NEW SIDEWALK (TYP.)



STOP

BOUNDARY STREET

STOP

N/F RYMKO OLYMPIA

HICKORY TRACE

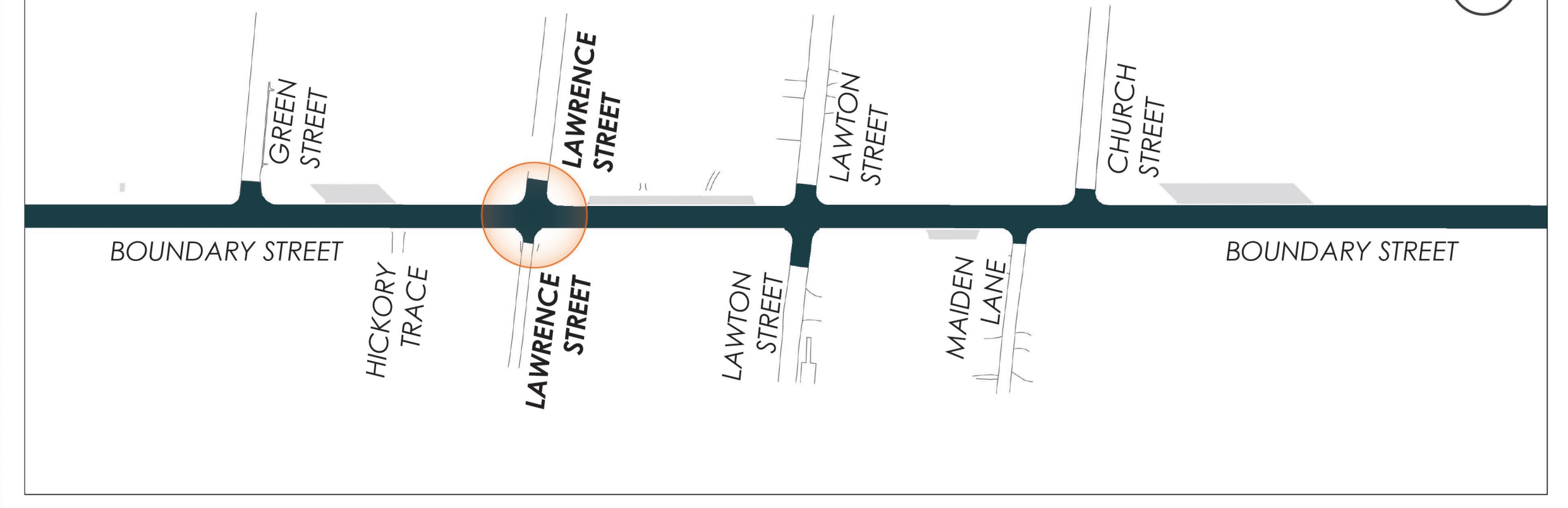
NEW STOP SIGNS AND PAVEMENT MARK (TYP.)

N/F KENNETH BURR

LAWRENCE STREET



**BOUNDARY STREET CONTEXT**



PREPARED FOR:



ILLUSTRATIVE SITE PLAN

**LAWRENCE & BOUNDARY ST INTERSECTION IMPROVEMENTS**

BLUFFTON | SOUTH CAROLINA

MAY 2026



50 PARK OF COMMERCE WAY  
SAVANNAH, GA 31405 • 912.234.5300  
WWW.THOMASANDHUTTON.COM

This map illustrates a general plan of the development which is for discussion purposes only, does not limit or bind the owner/developer, and is subject to change and revision without prior written notice to the holder. Dimensions, boundaries and position locations are for illustrative purposes only and are subject to an accurate survey and property description.

Current Site Conditions

Intersection of Boundary and Lawrence Streets

Photos taken on May 26, 2026





Proposed Motion

Consideration of a Resolution to Install a 4-way Stop Sign at the Intersection of Boundary and Lawrence Streets

**"I make a motion to approve the installation of 4-way stop signs at the intersection of Boundary and Lawrence Streets."**

# TOWN COUNCIL

## STAFF REPORT Executive Department



<b>MEETING DATE:</b>	June 9, 2026
<b>PROJECT:</b>	Consideration to Authorize the Town Manager to Negotiate an Amendment to the Purchase and Sale Agreement for An Approximately 55 Acre Parcel in the Buckwalter PUD
<b>PROJECT MANAGER:</b>	Stephen Steese, Town Manager

**REQUEST:** The Town Manager requests the authorization from Town Council to negotiate an amendment to the purchase and sale agreement for a 55.18-acre parcel, TMS No. R610-030-000-1970-0000, located in the Buckwalter Planned Unit Development (PUD) to extend the time to conduct due diligence for an additional six months, through December 10, 2026.

**BACKGROUND:** In 2024, Town Council authorized Staff to pursue acquisition of parcels in the Buckwalter PUD with funding from the Beaufort County Green Space fund for the purposes of conservation and potentially park planning. On August 14, 2025, the Town signed a purchase and sale agreement with Inland Bluffton, LLC, the owner of the 55-acre parcel in the Buckwalter Planned Unit Development. That 55-acre parcel is located between the two Foothills Land parcels that was purchased by the Town in December 2026. The total acreage of the three contiguous parcels is 294.555.

The Town has been conducting its required due diligence on the 55-acre parcel and that time is set to expire on June 10, 2026. In the process of taking the Foothills Land parcels through the County Green Space conservation process, the County expressed interest in potentially partnering with the Town to place a conservation easement on the 55-acre parcel. In order to fully explore that possibility, it is necessary to request an extension to the time to conduct due diligence. A six month extension should be a reasonable enough time.

**NEXT STEPS:** Approve Resolution for the Town Manager to negotiate.

**SUMMARY:** Authorize the Town Manager to negotiate a six month extension to the due diligence period in the purchase and sale agreement with Inland Bluffton, LLC to explore the possibility of placing a County conservation easement on the parcel in exchange for consideration from the County.

**ATTACHMENTS:**

1. Resolution
2. Recommended Motion

**RESOLUTION TO NEGOTIATE and execute the necessary documents TO EXTEND THE TIME TO CONDUCT DUE DILIGENCE for the purchase and sale of PARCEL 5C WITH INLAND BLUFFTON, LLC**

WHEREAS, the Town of Bluffton (the “Town”) and Inland Bluffton, LLC, (the “Owner”) negotiated a purchase and sale agreement for the conveyance of parcel of real property located in the Town of Bluffton, South Carolina, as more particularly described on Exhibit “A” attached hereto and fully incorporated herein (collectively, the “Property”) dated August 14, 2025; and,

WHEREAS, the time to conduct due diligence on the Property, including any extensions, was described in that purchase and sale agreement as expiring on June 10, 2026; and,

WHEREAS, in order to continue to perform said due diligence, an extension of six (6) months is necessary; and,

WHEREAS, Town Council desires to authorize the Town Manager to negotiate and execute the necessary documents for an extension of the time to conduct due diligence as provided in the purchase and sale agreement with Inland Bluffton, LLC.

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

1. The Town Council hereby authorizes the Town Manager to negotiate and execute the documents necessary to extend the time to conduct due diligence for an additional six (6) months, through December 10, 2026.
2. The Mayor, Town Manager, and Town Clerk are each hereby authorized to execute any and all documents necessary to amend the purchase and sale agreement, without limitation.

**THIS RESOLUTION SHALL BE EFFECTIVE IMMEDIATELY UPON ADOPTION,  
SIGNED, SEALED AND DELIVERED AS OF THIS 9th DAY OF JUNE, 2026.**

\_\_\_\_\_  
Larry C. Toomer, Mayor  
Town of Bluffton, South Carolina

ATTEST:

\_\_\_\_\_  
Marcia Hunter, Town Clerk  
Town of Bluffton, South Carolina

**EXHIBIT “A”  
(The Property)**

A PORTION of that certain piece, parcel or lot of land situate, lying and being in the Town of Bluffton, Beaufort County, South Carolina, more particularly described as 294.561 acres, said property having dimensions, metes and bounds as shown on the Plat entitled “*A Subdivision of A Portion of Parcel 5 Buckwalter Commercial, Inc., Town of Bluffton, Beaufort County, South Carolina,*” Sheet 1 of 1, said plat being prepared by Thomas & Hutton Engineering Co., Robert K. Morgan, SCPLS No. 26957, dated 12/30/2014 in Plat Book 140, Page 11. For a more detailed description as to the courses, metes and bounds of the above-mentioned lot, reference is had to said plat of record.

The property being conveyed herein is a portion of the same property conveyed to Inland Bluffton, LLC by University Investments, LLC on November 25, 2014 and recorded in the Beaufort County Register of Deeds on November 26, 2014 at Book 3362, Page 2157.

Recommended Motion

Authorization to Extend the Due Diligence Period in the Purchase and Sale Agreement for the 55.18 Acre Parcel Known as Parcel 5C in the Buckwalter PUD Owned by Inland Bluffton, LLC – Stephen Steese, Town Manager

**“I make a motion to authorize the Town Manager to extend the due diligence period in the Purchase and Sale Agreement with Inland Bluffton, LLC on the 55.18 acre parcel, more or less, shown on the plat recorded in the Beaufort County Register of Deeds at Book 140, Page 11, noted as Parcel 5C.”**

# TOWN COUNCIL



## STAFF REPORT Executive Department

<b>MEETING DATE:</b>	June 9, 2026
<b>PROJECT:</b>	Consideration of a Resolution to Establish an Entertainment Venue Exploratory Workgroup
<b>PROJECT MANAGER:</b>	Chris Forster, MPA, CPFO, CGFM, Assistant Town Manager

### **REQUEST:**

Town Staff requests that Town Council consider the following:

1. Authorization to establish an Entertainment Venue Exploratory Workgroup charged with evaluating the feasibility, potential scope, citing considerations, funding mechanisms, and community impact of developing an entertainment venue to serve the Town of Bluffton and surrounding areas.
2. Approval of the Workgroup's proposed charge, membership composition, and timeline for delivering findings and recommendations to Town Council, as further described in the attachments to this report.

### **BACKGROUND:**

#### **Overview**

The Town of Bluffton, South Carolina, has experienced sustained population growth and community development over the past two decades, resulting in an increasing demand for cultural amenities and public gathering spaces that reflect the Town's identity. The establishment of an Entertainment Venue Exploratory Workgroup represents a preliminary step in evaluating the feasibility, community need, and potential framework for a dedicated entertainment venue within the Town's jurisdiction.

#### **Completed Work**

The Town of Bluffton has long recognized the economic and cultural value of the arts. As early as November 2015, Town Council considered a resolution authorizing the designation of a State-Designated Cultural District by the South Carolina Arts Commission, reflecting a longstanding commitment to arts and cultural development in the community. Bluffton's cultural identity has historically supported its retail businesses and restaurants, and the Town has built its community character on inviting residents and visitors alike to engage with its cultural offerings.

In late 2024, at the request of some on Council, the Town formally initiated a feasibility study for a potential performing arts venue. Johnson Consulting was selected as the lowest responsive bidder. They were selected for their proven track record of work evaluating the feasibility of entertainment venues worldwide, their independence from construction and operations of such facilities and their record of proposing realistic assessments that don't always recommend proceeding with projects if the research does not justify it.

Johnson Consulting's engagement encompassed an eight-task scope of work, including project orientation and initial fieldwork, economic and demographic market analysis, performing arts and cultural trends analysis, review of performing arts and entertainment venues, stakeholder engagement, analysis of national comparable facilities, recommendations, and demand projections. The firm brought to the engagement a nationally recognized multi-task approach used on hundreds of feasibility projects across the country, as well as a substantial database of financial and operating data for performing arts centers throughout the U.S.

At the April 21, 2026 Town Council Quarterly Workshop, staff presented the performing arts venue research to date, including a broader discussion of the economic rationale for cultural investment and a summary of information gathered during site visits of similar facilities used in the benchmarking assessment. The workshop presented the connection between cultural investment and long-term economic prosperity.

### **Context and Purpose**

The Entertainment Venue Exploratory Workgroup is proposed as an advisory body tasked with conducting a comprehensive assessment of the viability of establishing an entertainment venue to serve the residents of the Town of Bluffton and the broader Lowcountry region. The Workgroup's work is intended to provide Town Council with an informed basis upon which to determine whether to advance the concept to subsequent planning, design, and funding phases.

The exploratory effort is consistent with the Town strategic plan's commitment to enhancing quality of life, fostering cultural enrichment, and supporting economic vitality through placemaking and community investment. A performing arts center or similar entertainment venue has the potential to serve as both a cultural anchor and an economic driver, attracting visitors, supporting local artists and arts organizations, and providing a venue for educational programming, civic events, and community gatherings.

### **Workgroup Composition**

The Exploratory Workgroup is expected to comprise members who collectively bring expertise and perspective relevant to the scope of the Workgroup's work. It is recommended to establish a Workgroup of at least seven members. It is recommended members serve one-year terms that can be renewed annually as long as the Council determines there is an ongoing need for the Workgroup. The Executive lead for the Workgroup will be Chris Forster, Assistant Town Manager, and the staff support for the Workgroup will be Paul Arvantides, Don Ryan CEO.

### **Timeline and Deliverables**

The Exploratory Workgroup is anticipated to conduct its work over the next 12 – 18 months, with a recommendation that the Workgroup periodically present its findings to Town Council. Deliverables are expected to include a report or presentation summarizing the Workgroup's research, analysis, funding feasibility, community engagement findings, and recommendations regarding whether and how the Town should proceed with further planning for a performing arts center.

### **Alignment with Town Plans and Priorities**

The exploration of an entertainment venue aligns with several themes and priorities articulated in the Town of Bluffton's adopted planning documents and strategic initiatives. The Town's Comprehensive Plan emphasizes the importance of cultural resources, placemaking, and community identity as integral components of sustainable growth. Investment in cultural infrastructure supports the Town's vision for a vibrant, livable community that retains its unique character while accommodating growth and diversifying its economic base.

Additionally, the exploration of an entertainment facility is consistent with the Town's commitment to providing high-quality public amenities and services that enhance resident satisfaction and community pride. The Workgroup's work will help ensure that any future decisions regarding a potential new venue are grounded in thorough research, community input, and sound fiscal analysis.

### **NEXT STEPS:**

Upon Town Council action regarding the establishment of the Entertainment Venue Exploratory Workgroup, the following sequential steps will occur:

1. **Town Council authorizes** the formation of the Entertainment Venue Exploratory Workgroup by resolution.
2. **Workgroup members are appointed** in accordance with the Town of Bluffton's established procedures for advisory workgroup appointments.
3. **The Entertainment Venue Exploratory Workgroup convenes** and begins its work pursuant to the scope and timeline outlined in the authorizing resolution, including any required community engagement, site evaluation, financial feasibility analysis, and partnership exploration.
4. **The Workgroup reports on findings and recommendations to Town Council** at the conclusion of the exploratory period, or at such interim milestones as directed by Town Council, for further deliberation and potential action.
5. **Town Council considers the Workgroup's recommendations** and determines whether to advance subsequent phases, which may include formal site selection, funding strategies, design procurement, or other actions as warranted by the Workgroup's findings.

Should Town Council request modifications to the Workgroup's charge, composition, or timeline, staff will incorporate those revisions and return with an updated resolution for consideration at a future regularly scheduled Town Council meeting.

**ATTACHMENTS:**

1. Workgroup Charge
2. Resolution
3. Proposed Motion

### Exploratory Workgroup Charge

The Entertainment Venue Exploratory Workgroup is charged with evaluating feasibility, identifying pros and cons, exploring fundraising potential, assessing community demand, exploring potential scope and design, identifying funding approaches, and highlighting planning considerations of a new entertainment venue in the Town of Bluffton. They oversee project goals, ensure stakeholder alignment, review preliminary findings, and make final recommendations to Council on whether to proceed and under what conditions.

#### 1. Purpose

- *Phase 1:* To investigate the feasibility, desirability, and financial viability of constructing and operating a new entertainment venue.
- *Phase 2 (if needed):* To make recommendations on scope, the physical design, operational model, and strategic plan.
- *Phase 3 (if needed):* Oversee planning and design.

#### 2. Scope of Responsibilities

- **Needs Assessment:** Assess reports on future entertainment venue needs, including specialized spaces.
- **Community Engagement:** Ensure community input is gathered on the project and proposal.
- **Feasibility & Planning:** Review preliminary site studies, design proposals, and cost estimates for the PAC and any associated amenities.
- **Funding & Financing:** Explore public-private partnerships, fundraising models, grant opportunities, and make recommendations on public funding approaches.
- **Project Oversight:** Provide expert oversight and direction, ensuring the project remains aligned with strategic goals.

#### 3. Key Deliverables

- A Workgroup assessment of current feasibility studies and applicable research identifying pros and cons of moving forward and a recommendation on how to proceed.
- A fundraising feasibility study identifying potential partners and an assessment of total potential private capital that could be raised.

- Survey results of community opinion on the need, scope and cost of an entertainment venue.
- Recommended operational structure to maintain and operate a new venue.
- Final report detailing project cost estimates, funding strategies, construction timeline and recommendation to proceed or not proceed with a project.

**4. Membership**

The Workgroup consists of up to seven members, approved by Bluffton Town Council. Members should consist of community members and/or business stakeholders and technical advisors. The Executive lead for the Workgroup will be Chris Forster, Assistant Town Manager. Staff support for the Workgroup will be led by Paul Arvantides, Don Ryan CEO.

**5. Reporting Structure**

- The Workgroup reports to the Town Council and submits updates at Councils request.
- The Workgroup may form subgroups, as needed to study specific issues and report to the Workgroup.

**6. Timeline**

September 8, 2026: Written report to Council - Assessment of feasibility studies and staff research.

October 27, 2026: Report on the findings of the fundraising feasibility study.

December 8, 2026: Presentation of community survey results.

January 2027: Comprehensive presentation of work to date and recommended next steps.

\*The schedule includes proposed dates but are subject to change based on progress of the Workgroup and the consultants that may be secured.

**RESOLUTION NO. 2026-\_\_**

**A RESOLUTION OF THE TOWN COUNCIL OF THE TOWN OF BLUFFTON, SOUTH CAROLINA,  
ESTABLISHING THE TOWN OF BLUFFTON ENTERTAINMENT VENUE EXPLORATORY  
WORKGROUP AND APPROVING THE WORKGROUP CHARGE**

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 council members which constitute the governing body of the Town (the "Town Council"); and

WHEREAS, the Town Council desires to establish the Town of Bluffton Entertainment Venue Exploratory Workgroup (the "Workgroup") as a time-limited advisory Workgroup; and

WHEREAS, Town Council desires to define the Workgroup's charge, procedures, and responsibilities, which are provided below; and

WHEREAS, the establishment of this Workgroup is consistent with the Code of Ordinances for the Town of Bluffton, Chapter 3, Boards, Workgroups and Commissions Terms, Appointments and Qualifications.

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

1. Town Council hereby establishes the Town of Bluffton Entertainment Venue Exploratory Workgroup (the "Workgroup").
2. The Workgroup is tasked with serving as an advisory body to Town Council by researching, evaluating, and reporting on the feasibility, regulatory considerations, economic impacts, and community implications of entertainment venues within the Town of Bluffton.
3. The Workgroup is charged with the following responsibilities:
  - a. A Workgroup assessment of current feasibility studies and applicable research identifying pros and cons of moving forward and a recommendation on how to proceed.
  - b. A fundraising feasibility study identifying potential partners and an assessment of total potential private capital that could be raised.
  - c. Survey results of community opinion on the need, scope and cost of an entertainment venue.
  - d. Recommended operational structure to maintain and operate a new venue.
  - e. Final report detailing project cost estimates, funding strategies, construction timeline and recommendation to proceed or not proceed with a project.

f. Perform such other related duties as may be assigned by Town Council.

4. Membership. The Workgroup shall consist of no more than seven (7) members appointed by Town Council. Workgroup members shall serve without compensation. No member of the Workgroup shall hold an elected position in the Town or other municipalities within Beaufort County.

5. Term. The Workgroup is established as a time-limited exploratory body. The Workgroup shall dissolve upon completion of the Workgroup charges and final presentation to Town Council if no additional charges are assigned to the Workgroup that extend their work, or upon a vote of Town Council to dissolve the Workgroup, whichever occurs first. Council may replace members of the Workgroup at their discretion.

8. Meetings. Meetings will be led by Town staff identified in the Workgroup charge. Staff will provide support to the Workgroup including but not limited to; conducting additional research, procuring consultants, and creating reports and presentations with direction from the Workgroup. The Workgroup shall meet as needed to fulfill its charge and shall adopt a meeting schedule at its first meeting. Meetings may be cancelled if there is no business before the Workgroup.

ADOPTED this \_\_\_ day of \_\_\_\_\_, 2026.

\_\_\_\_\_  
Larry Toomer, Mayor  
Town of Bluffton, South Carolina

ATTEST:

\_\_\_\_\_  
Marcia Hunter, Town Clerk  
Town of Bluffton, South Carolina

**Recommended Motion**

*"I make a motion to approve a Resolution Establishing the Town of Bluffton Entertainment Venue Exploratory Workgroup and Approving the Workgroup Charge."*

TOWN COUNCIL



STAFF REPORT

Department of Projects & Watershed Resilience

<b>MEETING DATE:</b>	June 9, 2026
<b>PROJECT:</b>	Consideration of an Ordinance to Amend the Town of Bluffton’s Municipal Code of Ordinances, Chapter 23 – Unified Development Ordinance, Article 5 – Design Standards, Sec. 5.10 (Stormwater); and Article 9 – Definitions and Interpretation, Sec. 9.2 (Defined Terms) – First Reading
<b>PROJECT MANAGER:</b>	Andrea Moreno, Watershed Division Manager

**INTRODUCTION:** As set forth in Section 3.5.2 of the Unified Development Ordinance (UDO), “an application for a UDO Text Amendment may be initiated by a Town of Bluffton property owner, Town Council, Planning Commission, or the UDO Administrator when public necessity, convenience, State or Federal law, general welfare, new research, or published recommendations on zoning and land development justifies such action.” These amendments were initiated by the UDO Administrator.

**REQUEST:** The UDO Administrator requests Town Council approval of certain text amendments to the Town of Bluffton’s Municipal Code of Ordinances, Chapter 23, Unified Development Ordinance, Article 5 – Design Standards, Sec. 5.10 (Stormwater); and Article 9 – Definitions and Interpretation, Sec. 9.2 (Defined Terms).

**WATERSHED ACTION PLAN ADVISORY COMMITTEE RECOMMENDATION:** The Watershed Action Plan Advisory Committee recommended approval of the proposed text amendments as presented on 4/23/26. See **Attachment 1** for the proposed amendments.

**PLANNING COMMISSION RECOMMENDATION:** The Planning Commission recommended approval of the proposed text amendments as presented on 5/27/26.

**BACKGROUND:** In January of 2025, Town Council approved a Master Service Agreement (MSA) task authorization to McCormick Taylor Inc. and Center for Watershed Protection (“Consultants”) to develop Town Wetland and Resilience Ordinances to protect the health, welfare, and safety of our citizens and natural resources.

As part of this ongoing work and specific to wetland protections, the Consultants have been tasked with reviewing current Town policies, identifying and inventorying wetlands within the Town’s jurisdiction, developing a map of wetlands to be protected, and developing a Wetland Ordinance for the Town.

Concurrent, yet independent from the MSA work, Town Council adopted a wetland protection ordinance in June of 2025, requiring a 50ft. undisturbed buffer around the perimeter of all wetlands and empowering staff for enforcement, filling gaps left by loosened federal rules after the U.S. Supreme Court’s “*Sackett v. Environmental Protection Agency*” decision. This initiative made Bluffton the first municipality in South Carolina to enact such laws in response to federal changes.

This ordinance was adopted under the premise that it would act as an interim wetland ordinance and would be superseded by a comprehensive wetland ordinance that would incorporate the Consultant’s recommendations and reliance upon a new, Town-owned, wetland mapping tool. Thus, staff are proposing amendments to the wetland protection ordinance to help ensure its defensibility and alignment with the Town’s watershed and resilience goals. Associated definitions are also proposed.

Furthermore, information about wetlands must stay current to ensure the Town develops effective tools to manage land use pressures and respond to changes in federal wetland protections. Accurate wetlands data allows the Town to define its objectives, apply the latest technology and tools for wetland mapping, focus its protection efforts, and inform future projects, policies, programs, and partnerships.

The Town currently relies on the National Wetland Inventory (NWI), which the primary source of mapped wetlands used across the country. However, within the Town, the NWI was last updated based on 2006 and 2011 imagery and does not often indicate the existence of small, isolated wetlands. While field delineation of wetland boundaries by a professional will be the ultimate determinant of where wetland and wetland buffers boundaries are located, the Town’s wetland mapping tool, which is planned to go “live” with the adoption of these proposed amendments, allows for both the Town and the applicant to know in advance which areas of the site are most likely to have wetlands present and plan accordingly.

**KEY CHANGES TO WETLAND ORDINANCE:** The following are a list of proposed key changes to the wetland ordinance:

- Scrivener’s errors;
- Addition of reference to Southern Lowcountry Stormwater Design Manual for any terms not explicitly defined in Section 9.2;
- Inclusion of watershed resilience-related language;
  - **MEANING** – as the Town moves forward with its creation of a Resilience Ordinance and Resilience Plan, inclusion of resilience-related language within the Stormwater Ordinance helps to tee up implementation of this forthcoming effort.
- Reference to a Town wetland map to aid applicants in wetland and wetland buffer identification;
- Addition of clarifying language regarding authority of UDO Administrator;
  - **MEANING** – discretion of UDO Administrator to exempt activities from the Wetland Ordinance or require additional measures prior to allowing an exception must utilize Town policies and guidelines and be documented in writing.

- Revisions to exemptions and exceptions;
  - US Army Corps of Engineers (USACE) exception.
 

**MEANING** – USACE permits to impact jurisdictional wetlands require an accompanying jurisdictional determination. Once the impacts to a jurisdictional wetland have been made, any remaining wetland on the property is subject to the Town’s Wetland Ordinance, including, but not limited to, the requirement of a 50 ft. undisturbed wetland buffer.
  - Prohibition of motorized vehicles along multi-purpose pathways in wetlands and wetland buffers, with the exception of ADA-compliant motorized wheelchairs, or vehicles used for a public purpose, including but not limited to, safety, maintenance or repair of publicly owned facilities or other infrastructure.
  - Inclusion of a stipulation that although stormwater management facilities and utility lines may be located within the wetland buffer, land disturbance must be minimized to the Maximum Extent Practicable (MEP).
  - Inclusion of allowed activities within a wetland, itself, including, but not limited to, construction and maintenance of public boardwalks, multi-use pathways, and water-dependent development such as docks, boat ramps, etc.
 

**NOTE** – Following feedback from Planning Commission Workshop held on 4/22/26, specific language about the multi-use pathways being pervious to the maximum extent practicable has been added.
- Assurances of protection to guarantee future wetland protections; and
- Revisions and Additions to Definitions.
  - Heavy Machinery (new)
 

**MEANING** – clarifies what constitutes heavy machinery and, therefore, which activities may be exempt from Sec. 5.10 (Stormwater).
  - Wetland Buffer (new)
  - Wetland Delineation (revision)
 

**NOTE** – Following feedback from Planning Commission Workshop on 4/22/26 and WAPAC review on 4/23/26, additional language specifying who can provide a wetland delineation has been added.

**REVIEW CRITERIA & ANALYSIS:** When assessing an application for UDO Text Amendments, Town Council is required to consider the criteria set forth in UDO Section 3.5.3, Application Review Criteria. These criteria are provided below, followed by a “Finding”.

1. **Section 3.5.3.A.** Consistency with the Comprehensive Plan or, if conditions have changed since the Comprehensive Plan was adopted, consistency with the overall intent of the Plan, recent development trends and the general character of the area.

**Finding.** The proposed amendments are consistent with Comprehensive Plan policies for stormwater management.

2. **Section 3.5.3.B.** Consistency with demographic changes, prevailing economic trends, and/or newly recognized best planning practices.

**Finding.** The proposed amendments support best-planning practices for stormwater management.

3. **Section 3.5.3.C.** Enhancement of the health, safety, and welfare of the Town of Bluffton.

**Finding.** The proposed amendments support the general welfare of the Town and its residents.

4. **Section 3.5.3.D.** Impact of the proposed amendment on the provision of public services.

**Finding.** The proposed amendments have no relationship to this criterion.

5. **Section 3.5.3.E.** The application must comply with applicable requirements in the Applications Manual.

**Finding.** The application complies with all applicable requirements of the Applications Manual.

**NEXT STEPS:**

UDO Text Amendment Procedure	Tentative Dates	Complete
Step 1. Town Council - Workshop	January 27, 2026	✓
Step 2. Public Comment Period	February 2 – March 2, 2026	✓
Step 3. Consultant Review Period	March 9 – March 23, 2026	✓
Step 4. Planning Commission Workshop	April 22, 2026	✓
Step 5. Watershed Action Plan Advisory Committee Meeting	April 23, 2026	✓
Step 6. Planning Commission Public Hearing and Recommendation	May 27, 2026	✓
Step 7. Town Council – First Reading	June 9, 2026	✓
Step 8. Town Council Meeting – Public Hearing and Final Reading	July 14, 2026	✗

**TOWN COUNCIL ACTIONS:** As granted by the powers and duties set forth in Sec. 2.2.6.C.4 of the UDO, Town Council has the authority to take the following actions with respect to this application:

1. Approval of the application as submitted;
2. Approval of the application with amendments; or
3. Denial of the application as submitted by the Applicant.

**ATTACHMENTS:**

1. Proposed Ordinance (Amendments)
2. Proposed Motion

**ORDINANCE NO. 2026 – \_\_\_\_\_**

**TOWN OF BLUFFTON, SOUTH CAROLINA**

**AN ORDINANCE AMENDING THE TOWN OF BLUFFTON’S MUNICIPAL CODE OF ORDINANCES, CHAPTER 23, UNIFIED DEVELOPMENT ORDINANCE, ARTICLE 5 – DESIGN STANDARDS, SEC. 5.10 (STORMWATER); AND ARTICLE 9 – DEFINITIONS AND INTERPRETATION, SEC. 9.2 (DEFINED TERMS)**

**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 authority to enact resolutions, ordinances, regulations, and procedures pursuant to South Carolina Code of Laws 1976, Section 5-7-30; and,

**WHEREAS**, the Town of Bluffton’s Town Code and Ordinances provide guidance and requirements for development within the Town of Bluffton through regulations set forth to protect and promote the health, safety, and welfare of the Town’s citizens, as espoused through the provisions of the Town of Bluffton Comprehensive Plan and as authorized by the South Carolina Local Government Comprehensive Planning Enabling Act of 1994, Title 6, Chapter 29 of the Code of Laws for South Carolina; and

**WHEREAS**, the Town of Bluffton Town Council adopted the aforementioned standards, which are known as the Unified Development Ordinance, Chapter 23 of the Code of Ordinances for the Town of Bluffton, South Carolina on October 11, 2011 through Ordinance 2011-15; and

**WHEREAS**, the Unified Development Ordinance unifies the subdivision, land use, development/design regulations, as well as the Old Town Bluffton Historic District Code into a single set of integrated, updated, and streamlined standards; and

**WHEREAS**, the 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 changes as deemed appropriate; and,

**WHEREAS**, the Strategic Plan for Fiscal Years 2025-26 (“Strategic Plan”) serves as a road map for activities and initiatives to implement the Town’s Vision and Mission Statement to ensure that Bluffton is poised to capitalize on opportunities that advance key goals, which includes amendments to the Unified Development Ordinance to support these goals; and

**WHEREAS**, the Town of Bluffton Town Council desires to amend the Unified Development Ordinance, Article 5 – Design Standards, Sec. 5.10 (Stormwater); and Article 9 – Definitions and Interpretation, Sec. 9.2 (Defined Terms) to enhance protections of wetlands and wetland buffers for stormwater management.

**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, Chapter 23, Unified Development Ordinance as follows:

SECTION 1. AMENDMENT. The Town of Bluffton hereby amends the Code Ordinances for the Town Of Bluffton, South Carolina by adopting and incorporating certain amendments to Chapter 23 – Unified Development Ordinance, including amendments to the following sections: Article 5 – Design Standards, Sec. 5.10 (Stormwater); and Article 9 – Definitions and Interpretation, Sec. 9.2 (Defined Terms) as shown on Exhibit A attached hereto and fully incorporated herein by reference.

SECTION 2. REPEAL OF CONFLICTING ORDINANCES. All ordinances or parts of ordinances 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 \_\_\_\_\_, 2026.

This Ordinance was read and passed on First Reading & Public Hearing on \_\_\_\_\_, 2026.

\_\_\_\_\_  
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 \_\_\_\_\_, 2026.

\_\_\_\_\_  
Larry C. Toomer, Mayor  
Town of Bluffton, South Carolina

\_\_\_\_\_  
Marica Hunter, Town Clerk  
Town of Bluffton, South Carolina

This Ordinance was passed at Second and Final Reading held on \_\_\_\_\_, 2026.

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Larry C. Toomer, Mayor  
Town of Bluffton, South Carolina

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Marcia Hunter, Town Clerk  
Town of Bluffton, South Carolina

## EXHIBIT A

### Sec. 5.10 Stormwater

*Proposed Changes: 1) Revise 5.10, "Stormwater" to include resilience-related language; and 2) Revise 5.10.7, "Wetlands" language to provide clarity to exemptions and exceptions to wetland ordinance, to include a list of allowed activities within wetlands themselves and provide assurances for the protection of wetlands and wetland buffers.*

#### Sec. 5.10.1. General Provisions

Any and all terms used in this Section that are not otherwise specifically defined in Section 9.2 shall be defined pursuant to the *Southern Lowcountry Stormwater Design Manual*. Any undefined terms shall have their ordinary and customary meanings based on the purposes, intent, design objective or other guidance associated with its use in this Section.

##### A. Intent

1.-3. *(No Changes)*

- 4. Grading can create problems with storm drainage and water quality by generating non-point source pollution. Grading plans for compliance with overall development shall be to maximize groundwater recharge, minimize runoff, ensure positive drainage within and from the site with no impact on adjacent property, ensure offsite drainage is received to an existing, adequate conveyance system, and prevent ~~M~~mass ~~G~~grading and ~~C~~clearing-cutting of a site.
- 5. These deleterious effects can be managed and minimized by applying proper design and well-planned controls to manage stormwater runoff from development sites, manage to protect existing natural features, such as trees and contours, that maintain hydrology and provide water quality control, and to eliminate potential sources of pollution to receiving waters. Public education regarding the cause and effect of these types of pollutions and the implementation of the controls and management policies is key to fundamentally changing public behavior.
- ~~6. The Town of Bluffton is required to comply with State and Federal regulations that require the adverse impacts of stormwater runoff rates, volumes and pollutant loads to be controlled and minimized.~~
- 6. The Town of Bluffton has determined that it is in the public interest to control and minimize the adverse impacts of certain development activities and has established this set of stormwater management provisions to regulate post-construction stormwater runoff rates, volumes and pollutant loads on development sites: as detailed in the *Southern Lowcountry Stormwater Design Manual*.
- 7. Further, the protection of wetlands and wetland buffer areas from encroachment, pollution, degradation, alteration or elimination is a crucial element of the Town's stormwater and water quality management plans and supports resilience efforts in anticipation of increased flooding, more frequent and severe weather events, future disasters, and changing environmental conditions as well as documented and projected sea-level rise. Procedures to protect, conserve, enhance and maintain wetlands and wetland buffers are in the public interest and support the general welfare of the Town.
- 8. This Article is essential to the public health, safety or welfare and shall apply to any Development that is subject to a development agreement.

- 9. Laws of general application throughout the Town necessary to protect health, safety and welfare are anticipated and are provided for in development agreements.
- ~~11. Substantial changes including, but not limited to, flooding, extreme weather events, sea level rise, and wetland protections have occurred, which changes, if not addressed in this Article would pose a threat to public health, safety or welfare of the Town of Bluffton.~~

**B. Purpose**

- 1. It is the purpose of this ~~Section~~ Article to protect, maintain, and enhance the environment of the Town and the short and long-term public health, safety, and general welfare of the citizens of the Town by establishing requirements and procedures to control the potential adverse effects of increased stormwater runoff associated with both future Development and existing developed land. Proper management of existing natural features, including wetlands and wetland buffers, and stormwater runoff will minimize damage to public and private property, ~~ensure~~ promote a functional drainage system, reduce the effects of Development on land and stream channel erosion, attain and maintain water quality standards, enhance the local environment associated with the drainage system, reduce local flooding, reduce pollutant loading to the maximum extent practicable and maintain to the extent practicable the pre- developed hydrologic characteristics of the area, ~~and~~ facilitate economic development while minimizing associated pollutant, flooding, and drainage impacts, and improve the Town’s resilience to changing environmental conditions.
- 2. This Article specifically authorizes and enables the Town to, at a minimum, ~~to~~ require any or all of the following:
  - a. ~~Prohibit Illicit Discharges to the Stormwater System and receiving waters-;~~
  - b. ~~Define procedures for site plan review, inspection, and enforcement relative to stormwater management-;~~
  - c. ~~Establish decision-making processes surrounding Development activities that protect the integrity of local aquatic resources;~~
  - d. ~~Control the discharge of spills, dumping or disposal of materials other than stormwater to the Stormwater System and receiving waters-;~~
  - e. ~~Address specific categories of non-stormwater discharges and similar other incidental non-stormwater discharges-;~~
  - f. ~~Require temporary erosion and sediment controls to protect water quality to the maximum extent practicable during construction activities, in accordance with current state regulations-;~~
  - g. ~~Define procedures for receipt and consideration of information submitted by the public-;~~
  - h. ~~Address runoff, particularly volume, rate, and quality through the control and treatment of stormwater with structural stormwater management practices facilities and/or Best Management Practices (BMPs) to provide volume control and at least an eighty (80) percent reduction in total suspended solids loads, thirty (30) percent reduction of total nitrogen load, and sixty (60) percent reduction in bacteria load-;~~
  - i. ~~Develop post-construction stormwater quality performance standards, through enforcement of minimum design standards for BMPs-;~~
  - j. ~~Ensure effective long-term operation and maintenance of BMPs-;~~
  - k. ~~Carry out all inspection, surveillance, monitoring, and enforcement procedures necessary to determine compliance and noncompliance with this Article and stormwater permit (permit) conditions including the prohibition of Illicit Discharges to the Town’s Stormwater System and~~

the protection of water quality of the receiving waters and wetlands;

- l. Establish minimum post-development stormwater management standards and design criteria set forth by the *Southern Lowcountry Stormwater Design Manual* (“Design Manual”) with the intent of reducing flooding, channel erosion, and pollutant transport and deposition in local aquatic resources;
- m. Establish minimum post-development stormwater management standards and design criteria in the *Design Manual* with the intent of preserving existing hydrologic conditions on Development sites;
- n. Establish design criteria in the *Design Manual* for structural and nonstructural stormwater management practices that can be used to meet the minimum post-development stormwater management standards and design criteria;
- o. Based on current Natural Resources Inventory, establish that Better Site Design (BSD), natural vegetative buffers, tree conservation, and site planning have been incorporated, documented, and presented in the Development design process to the maximum extent practicable-;
- p. Maintain structural and nonstructural stormwater management practices to ensure that they continue to function as designed and pose no threat to public safety; ~~and,~~
- q. In the event these requirements cannot be met, a fee-in-lieu shall be required as outlined in *Section 5.10.3.K.*; and,
- r. Define procedures for protection, conservation, enhancement, and proper maintenance of all existing wetlands and wetland buffer areas for stormwater management ~~water quality management.~~

**C. Applicability**

- 1. This Section shall apply to any or all of the following activities unless otherwise exempted by Sec. 5.10.1.C.2:
  - a.-b. *(No Changes)*
  - c. Any Land Disturbance, regardless of size, within a Larger Common Plan of Development where multiple, separate and distinct land disturbing activities may occur at different times and on different schedules; ~~and,~~
  - d. Any Land Disturbance within a wetland or wetland buffer area; ~~and~~
  - e. A Major Substantial Improvement of an existing lot-; or
  - f. Any illicit discharges
- 2. The following activities are exempt from ~~this Section~~ 5.10:
  - a. Any maintenance, alteration, renewal, or improvement as approved by the Town which does not alter existing drainage patterns, does not result in change or adverse impact on adjacent property, or create adverse environmental or water quality impacts, and does not increase the temperature, rate, quality, or volume or location of stormwater runoff discharge;
  - b. Projects that are exclusively for agricultural or silvicultural activities, not involving relocation of drainage canals or Land Disturbance within a Wetland, within areas zoned for these uses;
  - c.-d. *(No Changes)*
  - e. ~~Installation of nature trails or pervious pedestrian access paths no greater than five (5) feet in width;~~
  - e. Pruning or trimming of grasses, shrubs, and other smaller vegetation, provided these activities are accomplished without the use of Heavy Machinery;

- f. Planting native species of plants;
  - g. **Non-pesticide r**emoval of invasive species of plants;
  - ~~i. Any outdoor recreation activities not otherwise proscribed by the property owner or another applicable law or regulation, to include hiking, swimming, kayaking, canoeing, boating, horseback riding, hunting, fishing, shell fishing, and camping;~~
  - h. Research of soil, vegetation, water, fish, or wildlife for educational, scientific, or conservation purposes **provided that these activities are accomplished without the use of Heavy Machinery;**
  - i. Maintenance or repair of existing water-control devices or structures, provided the maintenance or repair does not involve enlarging, expanding, constructing, or relocating such water-control structures or devices; or
  - j. Maintenance and repair of existing utilities and roadways, provided the activity does not involve enlarging, expanding, constructing, or relocating such utilities and roadways.
- ~~3. Any illicit discharges.~~
4. The provisions of this Section shall apply throughout the incorporated areas of the Town.

**Sec. 5.10.2. Stormwater Management Program**

- A. **Coordination with Other Agencies.** The UDO Administrator will coordinate the Town’s activities with other federal, state, and local agencies, which manage and perform functions relating to the protection of receiving waters.
- B. **Cooperation with Other Governments and Private Entities.** The Town may enter into agreements with other governmental and private entities to carry out the purposes of this Article. These agreements may include, but are not limited to enforcement, resolution of disputes, cooperative monitoring, and cooperative management of stormwater systems and cooperative implementation of stormwater management programs.

Nothing in this Article or in this Section shall be construed as limitation or repeal of any ordinances of these local governments or of the powers granted to these local governments by the South Carolina Constitution or statutes, including, without limitation, the power to require additional or more stringent stormwater management requirements within their jurisdictional boundaries.

- C. **Southern Lowcountry Stormwater Design Manual**
  - 1. The UDO Administrator shall utilize the standards, criteria, and information presented in the *Design Manual* or applicable addendums, appendices, technical memorandums, and/or applicable revisions that may be applied for the proper implementation of this Article. This Manual may be updated and expanded periodically, based on improvements in science, engineering, monitoring, local experience, and state or federal water quality **and quantity** requirements.

The *Design Manual* identifies Special Watershed Protection Areas that have standards and criteria specific to land Development in these areas.

- D. **Compatibility with Other Regulations.** This **Section**Article is not intended to interfere with, modify or repeal any other ordinance, rule, regulation, or other provision of law. The procedures and standards set forth in this Ordinance, and the policies, procedures, and design data specified in the *Design Manual* provide the minimum standards to be adhered to by Development activities under the jurisdiction of the Town of Bluffton. If any regulation or requirement of this **Section**Article is in conflict with any other local, state or federal law, the most restrictive, or whichever imposes the highest

protective standards for ~~human health~~ public health, safety, and welfare or the environment, shall apply.

**Sec. 5.10.3. Standards**

**A. General Requirements**

1. All Development in the Town, including single family lots not part of a Larger Common Plan of Development, meeting applicability requirements in Section 5.10.1.C.1, shall meet the General Requirements to the Maximum Extent Practicable.
2. All Development activities shall utilize Structural and Nonstructural Stormwater Management Practices to control and minimize the increased stormwater runoff rates, volumes, and pollutant loads caused by Development in accordance with the criteria presented in the Design Manual.
3. For Structural and Nonstructural Stormwater Management Practices not included in the *Design Manual*, or for which pollutant removal and runoff reduction rates have not been provided, the effectiveness of the Structural and Nonstructural Stormwater Management Practices must be documented through prior studies, literature reviews, or other means and receive approval from the Town before being included in the design of a stormwater management system. In addition, if the site is located in a Watershed Protection Area or a Special Watershed Protection Area, the Town may impose additional requirements, which are located in the *Design Manual*, as deemed necessary.
- ~~3. All Development in the Town, including single family lots not part of a Larger Common Plan of Development, meeting applicability requirements in Section 5.10.1.C.1, shall meet the General Requirements to the Maximum Extent Practicable.~~
4. All Development shall disconnect Impervious Surfaces with vegetative surfaces to the ~~M~~maximum E~~xtent P~~racticable.
5. Stormwater runoff shall be controlled in a manner that:
  - a. Promotes positive drainage within the site and from structures and Impervious Surfaces resulting from Development.
  - b. Ensures no negative impact on adjacent and downstream properties/ or structures, as detailed in the *Design Manual*.
  - c. Includes the use of vegetated conveyances, such as swales and existing natural channels to promote infiltration.
  - d. Promotes runoff velocities that maintain sheet flow condition to prevent erosion and promote infiltration.
  - e. Limits its interaction with potential pollutant sources that may become water-borne and create non-point source pollution.
6. ~~Better Site Design, Natural Vegetative Buffers, Wetland Conservation~~ **Wetland and Wetland Buffer Protection, and Tree Conservation.** Better Site Design, natural vegetative buffers, wetland ~~conservation~~ protection of Wetlands and Wetland Buffers, and tree conservation play an integral part in minimizing the volume of stormwater runoff by promoting infiltration and acting as a first line of treatment of ~~water quality~~ stormwater runoff pollution. As such all Development subject to this ~~Section~~ Article shall comply with the following:
  - a. Better Site Design practices set forth in the Design Manual to the Maximum Extent Practicable;

- b. Any and all Wetland Buffer and other natural vegetative buffer requirements of this Article; other applicable Sections of the UDO, and if applicable, any approved concept plan, and/or approved master plan;
- c. Wetland and Wetland Buffer protection ~~conservation~~ requirements of this Article, and if applicable, any approved concept plan, and/or approved master plan; and
- d. Tree conservation as required by this UDO.

**B. Permit Application Requirements**

No property owner or Developer shall perform any Development activity without first meeting the requirements of this *Section 5.10* and the *Design Manual* and having been issued a stormwater permit from the Town. Unless specifically exempted by this *Section 5.10*, any property owner or Developer proposing Development activity shall submit to the Town a Stormwater Permit application and accompanying items as required in the *Design Manual*.

The UDO Administrator shall use the criteria and information, including technical specifications and standards, in the *Design Manual* as the basis for decisions about stormwater plans and about the design, implementation and performance of Structural and Non-structural Stormwater Management Practices as defined in the Design Manual. Specifically, permit applications shall contain standards as outlined in the Design Manual standards shall describe in detail how post-development stormwater runoff will be controlled and managed, the design of all stormwater facilities and practices, the components of a project plan necessary to meet the requirements of this Article and post-construction maintenance and inspection requirements.

The stormwater permit shall be valid for five (5) years from date of approval unless an extension is applied for and approved by the UDO Administrator.

**C. Maximum Extent Practicable Process**

The Maximum Extent Practicable (“MEP”) process defined by the *Design Manual* shall be the basis of submittals for plan approval under this Article. The consideration for a waiver of this Article’s requirements will rely on the MEP submittal and UDO Administrator review.

**D. Stormwater Surety**

Financial sureties for the cost of stormwater facilities approved for the proposed Development and/or Redevelopment shall be provided in accordance with the Town stormwater surety process as established in Section 3.13 and stormwater permit issuance process in the Design Manual ~~Section 3.13~~.

**E. (No Changes)**

**F. Stormwater Conveyance System**

Site development plans must include sStormwater conveyance systems, which may include but are not limited to culverts, stormwater drainage pipes, catch basins, drop inlets, junction boxes, headwalls, gutters, swales, channels, ditches, and energy dissipaters, shall be provided when necessary for the protection of public right-of-way and properties adjoining Development sites. Stormwater conveyance systems that are designed to convey stormwater runoff from more than one parcel shall meet the following requirements:

- 1. Methods used to calculate stormwater runoff rates and volumes shall be in accordance with the ~~latest edition of the~~ *Design Manual*;

- 2. All culverts, pipe systems, and open channel flow systems shall be sized in accordance with the stormwater management design plan using the methods included in ~~the latest edition of the~~ *Design Manual*; and,
- 3. Planning and design of stormwater conveyance systems shall be in accordance with the criteria and specifications found in ~~the latest edition of the~~ *Design Manual*; and
- 4. Off-site discharge points in the final approved stormwater plan submission and/or grading plan must be identified on the site plan. The receiving conveyance system must be determined to safely convey the 25-year, 24-hour storm, as certified by a licensed South Carolina Professional Engineer, and to not adversely impact downstream properties.

**G. Overbank Flood Protection**

All stormwater management systems shall be designed to control the post-development peak discharge generated by the Overbank Flood Protection storm event, as defined in ~~the latest edition of the~~ *Design Manual*, to prevent an increase in the frequency and magnitude of damaging overbank flooding and safely convey the design storms. A stormwater management system complies with this requirement if:

- 1. It provides Overbank Flood Protection in accordance with the criteria and information provided in ~~the latest edition of the~~ *Design Manual*; and,
- 2. Appropriate Structural and Nonstructural Stormwater Management Practices have been selected, designed, constructed, and maintained in accordance with the standards, criteria, and information presented in ~~the latest edition of the~~ *Design Manual*; and
- 3. Off-site discharge points in the final approved stormwater plan submission must be identified on the plan. The receiving conveyance system must be determined to safely convey the 2- to 25-year, 24-hour storm, as certified by a licensed South Carolina Professional Engineer, and to not adversely impact downstream properties.

**H. Extreme Flood Protection**

All stormwater management systems shall be designed to control and/or safely convey the post-development peak discharge generated by the Extreme Flood Protection storm event, as defined in ~~the latest edition of the~~ *Design Manual*, to protect downstream properties from flood damage, maintain the boundaries of existing floodplains, and protect the physical integrity of downstream stormwater conveyance features and flood control facilities. A stormwater management system complies with this requirement if:

- 1. It provides Extreme Flood Protection in accordance with the criteria and information provided in ~~the latest edition of the~~ *Design Manual*;
- 2. Appropriate Structural and Nonstructural Stormwater Management Practices have been selected, designed, constructed, and maintained in accordance with the standards, criteria, and information presented in ~~the latest edition of the~~ *Design Manual*; and

Adequate 100-year flow overflow path (as documented in the 10% analysis submission) from the site to adjacent properties is identified and determined to not have a negative impact on existing downstream receiving conveyance system(s), adjacent properties, and/or structures. This overflow path must be certified by a licensed South Carolina Professional Engineer.

**I. Structural Stormwater Management Practices**

All Structural Stormwater Management Practices shall be selected, designed, constructed, and maintained in accordance with the standards, criteria, and information presented in the latest edition of the *Design Manual* and any relevant addenda. Applicants shall consult the latest edition of the *Design Manual* for guidance on selecting Structural Stormwater Management Practices that can be used to satisfy the post-construction stormwater management criteria.

J. Grading

Mass Grading and Clearing-cutting shall not be permitted. No land within the Town shall be cleared, disturbed, graded, excavated, except as follows: It shall be unlawful to perform any Land Disturbance, or land disturbing activity, of 5,000 or more square feet or accruing a total exceedance of 5,000 square feet of impervious surface without a Grading Plan approved by the Town.

~~1. It shall be unlawful to perform any Land Disturbance, or land disturbing activity, of 5,000 or more square feet or accruing a total exceedance of 5,000 square feet of impervious surface without a Grading Plan approved by the Town of Bluffton.~~

- 1. Grading Plans shall be filed with and become part of any Application that equals or exceeds the threshold limits provided above. Such plans shall be prepared in accordance with [Article 3](#) and shall follow the requirements set forth in [Article 5 Design Standards](#).
- 2. Amendments to Grading Plans, Amendments, changes, or modifications of a minor nature to a plan required as a result of field conditions arising during construction may be required ordered or approved by the UDO Administrator.
- 3. Soil erosion and sediment control measures shall, at a minimum, conform to the Standards for Soil Erosion and Sediment Control per the *Design Manual*.

K. (No Changes)

L. **Detention Waiver.** Individuals seeking a detention waiver from the requirements of this Section may submit to the UDO Administrator a request for a waiver in accordance with the *Design Manual*.

**Sec. 5.10.4. Maintenance**

A. General Requirements

1.-2. (No Changes)

3. **Annual Maintenance Inspection and Report.** The person responsible for maintenance of any structural BMP installed pursuant to this Article shall submit to the UDO Administrator an inspection report from a certified post- construction BMP inspector, a registered South Carolina Professional Engineer or Landscape Architect. The inspection report, at a minimum, shall contain all of the following:

- a. The name and address of the land owner;
- b. The recorded book and page number of the lot of each structural BMP or a digital representation of the geographic location of each structural BMP;
- c. A statement that an inspection was made of all structural BMPs, and must include date of inspection;
- ~~d. The date the inspection was made;~~
- d. A statement that all inspected structural BMPs are performing as originally designed/ and intended, and comply with the terms and conditions of the approved maintenance agreement required by this Article;
- e. The inspector’s original signature and/or seal of the engineer inspecting the structural BMPs;

and

- f. Digital photographs of the structural BMPs and pertinent components integral to its operation, including but not limited to inlet/ ~~and~~ outlet control structures, downstream receiving channel/ ~~or~~ area, embankments and spillways, safety features, and vegetation.

All inspection reports shall be on Town forms provided to the UDO Administrator. An original inspection report shall be provided to the UDO Administrator one year from the date of As-Built certification and thereafter, every three (3) years on or before the date of the As-Built certification.

**B. Operation and Maintenance Agreement**

1. Prior to the issuance of stormwater permit requiring a structural BMP pursuant to this Article, the applicant or owner of the site must execute an operation and maintenance agreement/~~covenant~~ for each structural BMP identified on the approved Stormwater Management Plan for recordation in Beaufort County Register of Deeds. The operations and maintenance agreement must be approved by the UDO Administrator or his their designee, and shall be binding on all subsequent owners of the site, portions of the site, and lots or parcels served by the structural BMP.
2. The operation and maintenance agreement shall:
  - a. Require the owner or owners to maintain, repair and, if necessary, reconstruct the structural BMP to ensure the BMP functions as designed and intended in perpetuity;~~;~~
  - b. For each BMP identified on the approved Stormwater Management Plan, state the terms, conditions, and schedule of maintenance for each structural BMP;~~;~~
  - c. Grant to the Town a right of entry to inspect, monitor, maintain, repair, or reconstruct the structural BMP; however, in no case shall the right of entry, of itself, confer an obligation on the Town to assume responsibility for the structural BMP;~~;~~
  - d. Allow the Town to recover from the property or ~~home owner's~~ homeowner's association and its members any and all costs the Town expends to maintain or repair the structural BMPs or to correct any operational deficiencies. Failure to pay the Town all of its expended costs, after 45 days written notice, shall constitute a breach of the agreement. The Town shall thereafter be entitled to bring an action against the association and its members to pay, or foreclose upon the lien hereby authorized by the agreement against the property, or both, in case of a deficiency. Interest, collection costs, and attorney fees shall be added to the recovery;~~;~~
  - e. Provide a statement that this agreement shall not obligate the Town to maintain or repair any structural BMPs, and the Town shall not be liable to any person for the condition or operation of structural BMPs;~~;~~
  - f. Provide a statement that this agreement shall not in any way diminish, limit, or restrict the right of the Town to enforce any of its ordinances as authorized by law;~~;~~
  - g. Contain a provision indemnifying and holding harmless the Town for any costs and injuries arising from or related to the structural BMP, unless the Town has agreed in writing to assume the maintenance responsibility for the structural BMPs accepted dedication of all rights necessary to carry out that maintenance;~~;~~ and
  - h. Contain an attachment with the locations, dimensions, elevations, and characteristics of all structural BMPs detailed in the Stormwater Management Plan. The attachment shall include a north arrow, scale, boundary lines of the site, lot lines, existing and proposed roads and other information necessary to locate the structural BMPs.

3. Operation and Maintenance Agreement Recordation

Upon approval by the UDO Administrator or ~~his~~their designee, the operations and maintenance agreement shall be recorded with the Beaufort County Register of Deeds to appear in the chain of title of all subsequent purchasers under generally accepted searching principles. A copy of the recorded operation and maintenance agreement shall be given to the UDO Administrator prior to issuance of the development permit.

C. **Records of Installation and Maintenance Activities.** The owner of each structural BMP shall keep records of installation, inspections, maintenance, and repairs for at least five (5) years from the date of the record and shall submit the same upon reasonable request to the UDO Administrator.

D. **Nuisance.** The owner of each stormwater BMP shall maintain it so as not to create or result in a nuisance condition, such as but not limited to,  flooding, erosion, excessive algal growth, overgrown vegetation, mosquito breeding habitat, existence of unsightly debris, or impairments to public safety and health.

**Sec. 5.10.5. Illicit Discharges and Connections**

A.- B. *(No Changes)*

C. **Illicit Connections.** Connections to a receiving water and/or stormwater conveyance system that allow the discharge of non-stormwater, other than the exclusions described in this section are unlawful. Prohibited connections include, but are not limited to floor drains, ~~waste water~~wastewater from washing machines or sanitary sewers, wash water from commercial vehicle washing or steam cleaning, and ~~waste water~~wastewater from septic systems. Where such connections exist in violation of this section and said connections were made prior to the adoption of this Article or any other ordinance prohibiting such connections, the property owner or the person using said connection shall remove or correct the connection.

D. **Spills.** Spills or leaks of polluting substances released, discharged to, or having the potential to be released or discharged to a receiving water or the stormwater conveyance system, shall be contained, controlled, collected, and properly disposed. All affected areas shall be restored to their preexisting condition. Persons in control of the polluting substances shall immediately report the release or discharge to persons owning the property on which the substances were released or discharged, shall within two (2) hours of such an event shall notify the Bluffton Township Fire Department and Town of Bluffton Police Department (who will also notify the UDO Administrator, and all required federal and state agencies of the release or discharge). Notification shall not relieve any person of any expenses related to the restoration, loss, damage, or any other liability which may be incurred as a result of said spill or leak, nor shall such notification relieve any person from other liability which may be imposed by State or other law.

E. **Nuisance.** *(No Changes)*

**Sec. 5.10.6. Inspections**

A.-C. *(No Changes)*

D. **Wetland and Wetland Buffer Inspections.** The Town is authorized under this Section to inspect a project’s impact to wetlands and wetland buffer areas to determine compliance with conditions and

provisions of this Article or to perform any duty imposed upon the owner or developer by this Ordinance.

**Sec. 5.10.7. Wetlands**

**A. General Requirements**

1. This Section shall apply to all ~~building, development, redevelopment, and site alteration~~ Land Development within a wetland or wetland buffer area, except as otherwise set forth herein.
2. Any person proposing to carry out a wetland or wetland buffer disturbance under this Ordinance must, prior to the commencement of the activity, submit a Stormwater Permit application to the UDO Administrator and obtain permit approval.
3. The UDO Administrator shall review all materials submitted by an applicant and shall have the authority to require additional information about the project from the applicant, schedule a site visit, or require a preliminary meeting with the applicant. The UDO Administrator may also request a review of the project by the Development Review Committee (DRC).
4. The UDO Administrator has the authority to issue, deny, or conditionally approve stormwater permits for activities that impacts to Wwetlands and/or Wwetland Buffers, as documented in writing, consistent with the standards, goals, and criteria set forth in this Ordinance, ~~and~~ subject to the procedures established herein.
5. Under the UDO Administrator's discretion other development activities may be excepted from the provisions of this Section, in accordance with Town policies and guidelines and as documented in writing, after consideration of design constraints, existing reports, permits, covenants, and mitigation bank credits that adequately protect the wetland's water quality services, flood retention functions, and mitigate any loss of or damage to wildlife habitat or native plant communities.
6. The UDO Administrator may, in its discretion and in accordance with Town policies and guidelines, deem additional measures necessary prior to allowing the excepted activities in Sections 5.10.7.C4 and 5.10.7.C5, subsections (a) through (j) to proceed including, but not limited to, reports and permits, and covenants, and mitigation bank credits to adequately protect the wetland's water quality services, flood retention functions, and mitigate any loss of or damage to wildlife habitat or native plant communities. Such measures shall be documented in writing.
7. The regulation of land uses both within and adjacent to Wetlands, having been determined to be in the best interest of the Town, shall be done in a manner consistent with the review procedures and performance standards identified herein which reflect the relative importance, values, and functions of these areas.
8. No provisions of this Ordinance shall be construed to relieve the Applicant from the requirement to obtain permits issued by local, state, or federal agencies, prior to the commencement of any land disturbance activity within the boundaries of a wetland or wetland buffer.
9. This Section shall not apply to activities in wetlands that are within the jurisdiction of the federal government ("jurisdictional wetlands") as determined by the U.S. Army Corps of Engineers ("Corps"), provided that such impacts are permitted or approved under a valid permit, exemption, or other authorization (collectively, a "Corps Permit") issued by the ~~United States Army Corps of Engineers~~ under the rules of the appropriate district and provided that:

- a. the Corps Permit has not expired;
- b. the Corps Permit was issued on or prior to September 8, 2023; and,
- c. the terms and conditions of the issued Corps Permit for such project continue to be met in full. A copy of said Corps Permit shall be provided to the Town along with any statement of conditions.

For the purposes of this subsection (9), the jurisdictional nature of the wetlands shall be based on the federal law in effect at the time the Corps issues the Corps Permit.

- 10. For any Corps Permit issued after September 8, 2023, such Corps Permit shall govern any activities within wetlands that are within the jurisdiction of the federal government and subject to federal protection (i.e., jurisdictional wetlands) as determined by the United States Army Corps of Engineers, provided that the Corps Permit has not expired and the terms and conditions of the issued Corps Permit for such project continue to be met in full. A copy of said Corps Permit shall be provided to the Town along with any statement of conditions. The jurisdictional determination by the Corps for the Wetland(s) shall also be provided to the Town.
  - a. Exceptions. Following completion of Corps Permit activities, all other requirements established in this Section shall be applicable including, but not limited to, the requirement of a fifty (50) ft. Wetland Buffer.

For the purposes of this subsection (10), the jurisdictional nature of the wetlands shall be based on the federal law in effect at the time the Corps issues the Corps Permit.

**B. Wetland Delineation**

- 1. **Wetland Delineation Required.** Except as otherwise set forth in this Section, any person proposing to carry out a Land Disturbance or perform any applicable activity, as set forth in Section 5.10.1.C of this Ordinance, shall, prior to commencing the activity or the Land Disturbance, provide the Town with a Wetland Delineation completed within the last five (5) years.
- 2. **Exceptions.** A Wetland Delineation shall not be required if either of the ~~site is less than five (5) acres and~~ the following conditions are met:
  - a. The owner of the site certifies, via notarized affidavit, to the Town that to the best of their knowledge and belief, there are no Wetlands or Wetland Buffers on the site; and, ~~no~~ no Wetlands are identified on the site by any prior Wetland Delineations, or any existing watershed plans or Advanced Identification of Disposal Areas (ADID) studies, interim watershed plans, National Resources Conservation Service (NRCS) wetland inventory maps, ~~or~~ United States Fish and Wildlife Service National Wetlands Inventory Maps; or Town wetland maps; and,
  - b. The site is less than five (5) acres and the ~~The~~ Land Disturbance or activity proposed is accessory to the existing use and does not increase the density of the site.

**C. Wetlands and Wetland Buffers and Setbacks**

- 1. **Wetland Buffer Calculations Areas.** Wetland buffers are to be calculated by measuring horizontally outward from and perpendicular to the edge of the Wetland, as defined herein and

as delineated in accordance with 5.10.7.B. They must extend the entire length of the Wwetland Ddelineation within the property.

2. **Applicability.** A minimum buffer of fifty (50) feet shall be provided along the perimeter of all Wetlands.
3. **Prohibited Activities within Wetlands and Wetland Buffers.** The following activities are specifically prohibited within a Wetland or Wetland Buffer unless expressly authorized herein or elsewhere within the UDO.
  - a. ~~Removal, excavation, or disturbance of the soil~~Land Disturbance, except for minimal disturbance associated with the installation of trees and plants as approved by the UDO Administrator, where a Wetland Buffer is re-established;
  - b. Dumping or filling with any materials;
  - c. Placement of any sod or garden of any type;
  - d. Placement of structures or other pervious or impervious surfaces; and,
  - e. Removal or destruction of trees, plants, grasses, or vines.
4. **Exceptions within Wetland Buffers.** The following activities ~~may occur~~are permitted in a required Wetland Buffer, subject to specified limitations, ~~and the requirements below,~~any other applicable UDO regulations, and as approved by the UDO Administrator.
  - a. Maintenance of existing buffer ~~landscaping in a manicured fashion~~vegetation, ~~as approved by the UDO Administrator;~~
  - b. Construction and maintenance of public multi-purpose pathways, including minor associated structures such as footbridges, benches, and signage, provided:
    - (1) the multi-purpose pathway is not more than ten (10) feet wide;
    - (2) the multi-purpose pathway is pervious to the maximum extent practicable; and,
    - (3) Motorized vehicles are prohibited with the exception of American Disabilities Act-compliant motorized wheel chairs, or vehicles used for a public purpose including, but not limited to, safety, maintenance or repair of publicly owned facilities or other infrastructure.
  - c. Construction and maintenance of pedestrian walkways, including minor associated structures such as benches and signage, that provide public access to adjacent wetlands for wildlife management and viewing, fishing, and recreational purposes, or that provide access to approved water-dependent development activities – provided the walkway is not more than five feet wide and is pervious;
  - d. Construction and maintenance of pervious bulkheads or revetments, including associated backfill in tidal Wwetland Buffers – provided:
    - (1) A Wetland Buffer in accordance with the standards in this section is re-established; and
    - (2) The UDO Administrator approves the replanting plan and any tree removal;
  - e. Construction and maintenance of impervious bulkheads or revetments;
  - f. Essential development activities such as stormwater management facilities and water, sanitary sewer, telephone, natural gas, cable TV, or other utility lines – provided:

- (1) Stormwater management facilities and utility lines that must cross the buffer shall do so at approximately a right angle to minimize the area of Wetland Buffer width disturbed; and,
- (2) Stormwater management facilities and utility lines may be located within the Wetland Buffer if the utility or drainage easement allows the vegetation necessary to provide for significant filtration of stormwater runoff before it reaches the Wetland, and if the applicant can demonstrate that the facility or utility line will not degrade or harm the Wetland protected by the impacted buffer, and if land disturbance is minimized to the MEP; otherwise the UDO Administrator shall require an additional buffer width to provide the space for such filtration between the facilities or utility lines and the Wetland.
- g. Water-dependent development activities such as docks, boat ramps, shoreline stabilization, and stream and wetland restoration;
- h. Limited removal of the following:
  - (1) Trees or other vegetation determined by the UDO Administrator to be dead, dying, or diseased, provided the root system is retained intact;
  - (2) Non-native trees or other vegetation determined by the UDO Administrator to constitute a threat to the growth or reintroduction of native species of vegetation;
  - (3) Fallen trees, tree limbs, brush, and similar debris that have accumulated in or along stream beds and are determined by the UDO Administrator to substantially impede stream flow;
  - (4) Fallen trees, tree limbs, and brush that are determined by the UDO Administrator to impede pedestrian or bicycle traffic along approved multi-purpose pathways and pedestrian walkways.
- ~~i. Any impervious surfaces shall either be sloped away from the wetland and stormwater runoff from them shall be routed over a greater distance for filtration purposes, or constructed or installed in accordance with an alternative filtration design approved by the Official as ensuring that the impervious surfaces do not adversely impact the natural functionality of the Wetland Buffer;~~
- ~~j. Under the UDO Administrator's discretion other development activities may be excepted from the provisions of this Section after consideration of design constraints, existing reports, permits, covenants, and mitigation bank credits that adequately protect the wetland's water quality and mitigate any loss of or damage to wildlife habitat or native plant communities.~~
- ~~k. The UDO Administrator may, in its discretion, deem additional measures necessary prior to allowing the excepted activities in subsections (a) through (j) to proceed including, but not limited to, reports, permits, covenants, and mitigation bank credits to adequately protect the wetland's water quality and mitigate any loss of or damage to wildlife habitat or native plant communities.~~
- 5. **Exceptions within Wetlands.** The following activities may occur in a Wetland, subject to specified limitations and the requirements below and as approved by the UDO Administrator.
  - a. Construction and maintenance of public boardwalks;
  - b. Construction and maintenance of multi-use pathways, including minor associated structures such as footbridges, benches, and signage, provided the pathway is not more than ten (10) feet wide, pervious to the maximum extent practicable, and not to be used by motorized

vehicles with the exception of American Disabilities Act-compliant motorized wheel chairs, or vehicles used for a public purpose including, but not limited to, safety, maintenance or repair of publicly owned facilities or other infrastructure;

- c. Water-dependent development such as docks, boat ramps, shoreline stabilization, and stream and wetland restoration; and
- d. Routine maintenance and repair of existing structures such as piers.

**D. Other Requirements**

1. **Notification of Start of Project.** *(No Changes)*

2. **Temporary Survey Stakes.** Temporary survey stakes or flags delineating boundaries between ~~W~~wetlands, ~~Wetland B~~buffer areas, ~~setbacks~~, and adjacent property must be placed at all project sites by an engineer or surveyor. The markers shall follow the contour of the ~~W~~wetlands, ~~and~~ Wetland Buffer ~~area~~, ~~and setbacks~~ and shall be placed not more than fifty (50) feet apart.

3. **Assurances of Protection.** Assurances for the protection of Wetlands will be provided by the applicant as part of the application/certification process established in Article 3. This may take the form of deed restrictions, conservation easements, permit restrictions or other assurances of protection as approved by the UDO Administrator.

a. Permit Restrictions. An assurance of protection may be provided by the Applicant to the Town by executing a Permit Restriction Form that shall remain in the Town’s records. In executing said form, Applicant or any successor in interest, may not for a period of five (5) years, submit an application for wetland impacts on the Wetlands shown on the recorded survey, as required in Subsection b herein. This permit restriction shall not apply to the Wetland Buffers and may be waived by the UDO Administrator solely for public purposes.

b. Recordation Required. Wetland Buffer areas and their protected wetlands must be platted and recorded with the Beaufort County Register of Deeds, along with a description of the restrictions.

**Sec. 5.10.8 – Violations, Enforcement, and Penalties** *(No Changes)*

**Sec. 9.2 Defined Terms**

*Proposed Changes: 1) Addition of definitions of “heavy machinery” and “wetland buffer”; and 2) Revise current definition of “wetland delineation.”*

**Heavy Machinery:** Large, powerful, heavy-duty vehicles and machines used for construction, earthmoving, demolition, mining, and farming; featuring powerful hydraulic systems and specialized attachments for tasks like digging (excavators), lifting (loaders, forklifts), grading (motor graders), and hauling (dump trucks).

**Wetland Buffer:** A transition zone between a Wetland and Upland areas, designed to protect the Wetland’s water quality, wildlife habitat, and ecological functions by filtering pollutants, stabilizing soil,

and moderating runoff from Development. The wetland buffer shall be subject to the regulations for Wetlands as defined in this Ordinance and shall be determined to be the area extending horizontally away from and paralleling the outermost boundary of a Wetland.

**Wetland Delineation:** A wetland delineation report, identifying and evaluating the boundaries, location, limits, area, and quality of all on-site Wetlands, with such delineation to be conducted in accordance with the “Corps of Engineers Wetland Delineation Manual,” technical report: Y-87-1, from 1987, as may be amended from time to time. When such a delineation and report is required as part of a land use application, such report and delineation ~~may~~shall be required to be updated and revised if the original report was prepared more than ~~three~~five (5) years prior to the date of submission of the land use application. The wetland delineation report shall be completed by an individual with professional knowledge or experience in identifying the boundaries of wetlands; including, but not limited to, professionals in the fields of environmental science, wetland biology and ecology (e.g., wetland scientist).

**Consideration of an Ordinance to Amend the Town of Bluffton’s Municipal Code of Ordinances, Chapter 23 – Unified Development Ordinance, Article 5 – Design Standards, Sec. 5.10 (Stormwater); and Article 9 – Definitions and Interpretation, Sec. 9.2 (Defined Terms) – First Reading**

**Proposed Motion**

*“I move to **approve (approve as amended or deny)** First Reading of an Ordinance to amend the Town of Bluffton Code of Ordinances, Chapter 23 – Unified Development Ordinance, Article 5 – Design Standards, Sec. 5.10 (Stormwater); and Article 9 – Definitions and Interpretation, Sec. 9.2 (Defined Terms).”*

**TOWN COUNCIL**



**STAFF REPORT**  
**Finance & Administration Department**

<b>MEETING DATE:</b>	June 9, 2026
<b>PROJECT:</b>	Consideration of Accommodations Tax Advisory Committee Funding Recommendations for Quarter Ending March 31, 2026
<b>PROJECT MANAGER:</b>	Shannon Milroy, Budget & Procurement Manager

**REQUEST:**

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

<b>Requesting Organization</b>	<b>Amount Requested</b>	<b>Amount Recommended</b>
<b>The Farmer’s Market of Bluffton:</b> 2026 Supplemental Facility Support	\$ 9,375	\$ 9,375
<b>Hilton Head Symphony Orchestra:</b> 2026 Bluffton Concerts	46,818	46,818
<b>Beaufort Water Search and Rescue:</b> Replacement of Boat	21,875	0
<b>Beaufort Water Search and Rescue:</b> FY2026 Marketing Campaign regarding boater safety	7,500	0
<b>The Bluffton MLK Observance Committee:</b> 11 <sup>th</sup> Annual Juneteenth Celebration	20,000	20,000
<b>Historic Bluffton Foundation:</b> FY2027 Heyward House Museum Operations	50,000	50,000
<b>Total for Quarter Ending March 31, 2026</b>	<b>\$ 155,568</b>	<b>\$ 126,193</b>

**BACKGROUND:**

In accordance with the grant process, the Accommodations Tax Advisory Committee (ATAC) held a meeting on May 19, 2026 to review the quarterly applications. There were six (6) applications to review and make recommendations of funding to Town Council.

**Funds Currently Available for Distribution:**

When comparing the State Accommodations Tax collections for the quarter ending March 2026 to the same quarter of last year, the revenues increased \$15,559 or approximately 8.9%.

Total estimated State Accommodations Tax funds currently available for distribution are \$517,123 as outlined in the following chart:

<b>State ATAX</b>	
Remaining from Previous Quarters	\$ 321,808
3 <sup>rd</sup> Quarter Revenue	189,743
First \$25k to General Fund*	-
5% to General Fund	(9,487)
30% to DMO	(56,923)
15% to Town of Bluffton – Housing	(28,462)
Lapsed Grants	100,444
<b>Total State ATAX Funds Remaining for Distribution</b>	<b>\$ 517,123</b>

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

**Funds Requested for Distribution:**

**□ The Farmer’s Market of Bluffton requests \$9,375 in facilities support supplemental funding for the 2026 Market Season.**

- Previous award for the 2026 Market Season of \$66,500 was made during the December 9, 2025 Town Council Meeting; if approved, funding for 2026 would increase to \$75,875 or 41.7% of the Famer’s Market total 2026 budget of \$182,150.
- The additional funds will be used to cover vendue rental fees at Martin Family Park.
- The Market will continue to run on Thursdays until December 17, 2026.
- Statistics consistently show approximately 75% tourist attendance
- Eligible “tourism-related expenditures” include:
  - Rental of venue with an additional budget of \$9,375 under the “Facilities for Civic and Cultural Events” increasing the category total from \$12,500 to \$21,875

**The committee voted unanimously to recommend a supplemental award of \$9,375; budget for this ask plus the prior award are presented in the chart below:**

<b>Eligible Tourism-Related Expense Categories (per SC Code of Laws)</b>	<b>Total Budget for Category</b>	<b>Recommended ATAX Funds</b>
Advertising & Promotion of Tourism or Arts and Cultural Events	\$ 54,000	\$ 54,000
Facilities for Civic and Cultural Events:	21,875	21,875
Public Facilities:	-	*
Municipality and County Services:	-	*
Tourist Transportation:	-	*
Other/Ineligible Project Expenses	106,275	N/A
<b>Total</b>	<b>\$ 182,150</b>	<b>\$ 75,875</b>

\* Based on percentage directly related to tourist attendance

N/A – Not Applicable

**□ Hilton Head Symphony Orchestra requested \$46,818 to support advertising and promotion of tourism and facilities for civic and cultural events for the 2026 Bluffton Concerts.**

- Two events are scheduled; one on October 16, 2026 during the Historic Bluffton Arts & Seafood Festival in Martin Family Park and a Holiday Pops concert held on November 28, 2026 at St. Gregory the Great Catholic Church.
- The October concert is free to attendees, and the November performance will offer reasonably priced tickets.
- Eligible “tourism-related expenditures” include:
  - “Advertising and promotion of tourism” for print and broadcast media, social media, brochures and printed programs
  - “Facilities for cultural events” for stage, tent, HVAC, and sound and lighting equipment rentals
  - “Public Facilities” for Port-o-Lets rental

The committee voted to recommend a total award of \$46,818 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	\$ 13,072		\$ 13,072
Facilities for Civic and Cultural Events	33,012		33,012
Public Facilities	734		734
Municipality and County Services	-	*	-
Tourist Transportation	-	*	-
Other/Ineligible Project Expenses	53,256		N/A
<b>Total</b>	<b>\$ 100,074</b>		<b>\$ 46,818</b>

\* Based on percentage directly related to tourist attendance N/A – Not Applicable

**□ Beaufort Water Search and Rescue requests \$21,875 for the purchase of a replacement boat used for water rescue services and water related event patrols.**

- This request is the same as was submitted and considered last quarter with the additional expenses of upfitting and delivery added to the project budget.
- The total estimated cost is \$43,750; half, or \$21,875, has been requested.
  - Donations, prior grant carryover from other sources, and BWSAR reserves will be used as matching funds.

The committee voted unanimously to not recommend an award to Town Council.

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	\$ 13,072		\$ 13,072
Facilities for Civic and Cultural Events	33,012		33,012
Public Facilities	734		734
Municipality and County Services	-	*	-
Tourist Transportation	-	*	-
Other/Ineligible Project Expenses	53,256		N/A
<b>Total</b>	<b>\$ 100,074</b>		<b>\$ 46,818</b>

\* Based on percentage directly related to tourist attendance N/A – Not Applicable

**□ Beaufort Water Search and Rescue requests \$7,500 in support of a targeted FY2026 Tourism Safety Awareness and Marketing Campaign.**

- Funds would be used to create a marketing campaign utilizing social media, e-mail and brochures to educate the public on boater safety and increase visibility of the BWSAR organization.
- Brochures would be left at boat landings and DNR offices
- The total estimated cost of the campaign is \$15,000.

**The committee voted unanimously to not recommend an award to Town Council.**

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	\$ 8,270		\$ 0
Facilities for Civic and Cultural Events	-		-
Public Facilities	-		-
Municipality and County Services	-	*	-
Tourist Transportation	-	*	-
Other/Ineligible Project Expenses	6,730		N/A
<b>Total</b>	<b>\$ 15,000</b>		<b>\$ 0</b>

\* Based on percentage directly related to tourist attendance                      N/A – Not Applicable

**□ 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 11<sup>th</sup> Annual Bluffton Juneteenth Weekend.**

- The annual festival kicks off with Food Truck Friday on June 19th followed by a free, family-friendly event on Saturday, June 20<sup>th</sup> and a ticketed brunch on Sunday, June 21<sup>st</sup>; all events will take place at Ma Daisy’s Porch.
- 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” for local and national radio spots, social media, and posters/signage
  - “Facilities for cultural events” for rentals of tents, stage, chairs, and sound and audio equipment
  - “Public facilities” for sanitation and restrooms; based upon % of tourist attendance
  - “Municipality services” for event security; based upon % of tourist attendance
  - “Tourist transportation” for shuttles/trolleys; 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	\$ 12,600	\$ 12,600
Facilities for Civic and Cultural Events	11,500	11,500
Public Facilities	3,250	*
Municipality and County Services	2,100	*
Tourist Transportation	400	*
Other/Ineligible Project Expenses	21,500	-
<b>Total</b>	<b>\$ 51,350</b>	<b>\$ 20,000</b>

**□ Historic Bluffton Foundation (HBF) requests \$50,000 to support operations of the Heyward House Museum for fiscal year 2027 (July 1, 2026 through June 30, 2027).**

- The request of \$50,000 is the limit for operational expenses for facilities.
- This year’s request for operations support associated with the Heyward House Museum does not include payroll/salaries or any capital projects/expenses
- Annual visitors are projected to be 37,000 with approximately 88% being from out of town.
- Eligible “tourism-related expenditures” include:
  - “Operating Expenses” including advertising, utilities, subscriptions, office & janitorial supplies, insurance, minor repairs, and contracted services such as cleaning, pest control, landscaping, and accounting.

**The committee voted to recommend a total award of \$50,000 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	\$ -	\$ -
Facilities for Civic and Cultural Events	-	-
Public Facilities	-	-
Municipality and County Services	-	*
Tourist Transportation	-	*
Operating Expenses	218,900	50,000
Other/Ineligible Project Expenses	499,663	N/A
<b>Total</b>	<b>\$ 718,563</b>	<b>\$ 50,000</b>

**NEXT STEPS:**

Town Staff will notify organizations of award amount and requirements.

**SUMMARY:**

Below are the applications received for quarter ending March 31, 2026 and ATAC's recommendation for each:

<b>Requesting Organization</b>	<b>Amount Requested</b>	<b>Amount Recommended</b>
<b>The Farmer's Market of Bluffton:</b> 2026 Supplemental Facility Support	\$ 9,375	\$ 9,375
<b>Hilton Head Symphony Orchestra:</b> 2026 Bluffton Concerts	46,818	46,818
<b>Beaufort Water Search and Rescue:</b> Replacement of Boat	21,875	0
<b>Beaufort Water Search and Rescue:</b> FY2026 Marketing Campaign regarding boater safety	7,500	0
<b>The Bluffton MLK Observance Committee:</b> 11 <sup>th</sup> Annual Juneteenth Celebration	20,000	20,000
<b>Historic Bluffton Foundation:</b> FY2027 Heyward House Museum Operations	50,000	50,000
<b>Total for Quarter Ending March 31, 2026</b>	<b>\$ 155,568</b>	<b>\$ 126,193</b>

**ATTACHMENTS:**

1. ATAC draft meeting minutes from May 19, 2026
2. The Farmer's Market of Bluffton: 2026 Market Season – Facilities Supplemental ATAC Staff Report, Grant Application, and Scoring Sheet
3. Hilton Head Symphony Orchestra: 2026 Bluffton Concerts ATAC Staff Report, Grant Application, and Scoring Sheet
4. Beaufort Water Search and Rescue: Replacement of Boat ATAC Staff Report, Grant Application, and Scoring Sheet
5. Beaufort Water Search and Rescue: FY2026 Targeted Marketing Campaign ATAC Staff Report, Grant Application, and Scoring Sheet
6. The Bluffton MLK Observance Committee: 11<sup>th</sup> Annual Juneteenth Festival Weekend ATAC Staff Report, Grant Application, and Scoring Sheet
7. Historic Bluffton Foundation: FY2027 Heyward House Operations ATAC Staff Report, Grant Application, and Scoring Sheet
8. Previously Funded Grant Listing

# Accommodation Tax Advisory Committee Meeting

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

May 19, 2026

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This meeting can be viewed live on [BCTV](#), on Sparklight Channel 9 and 417 or on Spectrum Channel 1304.

## I. CALL TO ORDER

Chair Parker called the meeting to order at 6:00 p.m.

## II. ROLL CALL

### PRESENT

Chairperson Christy Parker  
Vice Chair Sam Britt  
Ellen Shumaker  
Scott Thrasher  
Michael Garibaldi

### ABSENT

Nate Pringle

## III. ADOPTION OF MINUTES

1. Meeting Minutes of February 17, 2026

Motion made by Shumaker to adopt minutes as drafted. Seconded by Thrasher.  
Voting Yea: Chairperson Parker, Vice Chair Britt, Shumaker, Thrasher, Garibaldi

## IV. PUBLIC COMMENT

## V. FINANCIAL REPORT

Shannon Milroy, Budget & Procurement Manager, reported 3rd Quarter Fiscal Year 2026 collections of \$189,723, up slightly from the same quarter last fiscal year. Six applications for funding were received this quarter totaling \$155,568 in requests; there is \$517,123 available for distribution.

## VI. OLD BUSINESS

## VII. NEW BUSINESS

1. Presentation of the Hilton Head Island-Bluffton Chamber of Commerce's Bluffton Marketing Plan for the FY2026-2027 Budget as the Town's Designated Marketing Organization (DMO)

Ariana Pernice from the HHI-Bluffton Chamber of Commerce presented a recap of the prior fiscal year and its successes as well as the DMO Strategic Marketing Plan for Bluffton for FY2026-2027.

Motion to recommend the DMO Marketing Plan to Town Council as presented made by Vice Chair Britt, Seconded by Shumaker.

Voting Yea: Chairperson Parker, Vice Chair Britt, Shumaker, Thrasher, Garibaldi

2. Grant Application Q&A: Farmer's Market of Bluffton - Facilities Support  
 Motion to recommend supplemental award of \$9,375 to Town Council made by Shumaker, Seconded by Thrasher.  
 Voting Yea: Chairperson Parker, Vice Chair Britt, Shumaker, Thrasher, Garibaldi
3. Grant Application Q&A: Hilton Head Symphony Orchestra - 2026 Bluffton Concerts  
 Motion to recommend award of \$46,818 to Town Council made by Garibaldi, Seconded by Vice Chair Britt.  
 Voting Yea: Chairperson Parker, Vice Chair Britt, Shumaker, Thrasher, Garibaldi
4. Grant Application Q&A: Beaufort Water Search & Rescue - Purchase of Replacement Boat  
 The committee feels that accommodations tax funds are not an appropriate use for the purchase. Motion to not recommend an award to Town Council made by Vice Chair Britt, Seconded by Shumaker.  
 Voting Yea: Chairperson Parker, Vice Chair Britt, Shumaker, Thrasher, Garibaldi
5. Grant Application Q&A: Beaufort Water Search & Rescue - FY2026 BWSAR Marketing Campaign  
 The committee feels that this marketing campaign would not bring tourists to Bluffton, which is the intent of accommodations tax grant funds. Motion to not recommend an award to Town Council made by Vice Chair Britt, Seconded by Garibaldi.  
 Voting Yea: Chairperson Parker, Vice Chair Britt, Shumaker, Thrasher, Garibaldi
6. Grant Application Q&A: Bluffton MLK Observance Committee - 11th Annual Juneteenth Festival  
 Motion to recommend award of \$20,000 to Town Council made by Thrasher, Seconded by Garibaldi.  
 Voting Yea: Chairperson Parker, Vice Chair Britt, Shumaker, Thrasher, Garibaldi
7. Grant Application Q&A: Historic Bluffton Foundation - FY2027 Heyward House Museum Operations  
 Motion to recommend award of \$50,000 to Town Council made by Shumaker, Seconded by Vice Chair Britt.  
 Voting Yea: Chairperson Parker, Vice Chair Britt, Shumaker, Thrasher, Garibaldi

**VIII. DISCUSSION**

**IX. ADJOURNMENT**

Motion to adjourn made by Vice Chair Britt, Seconded by Garibaldi.  
 Voting Yea: Chairperson Parker, Vice Chair Britt, Shumaker, Thrasher, Garibaldi  
 Meeting adjourned at 7:11 p.m.

# ACCOMMODATIONS TAX ADVISORY COMMITTEE STAFF REPORT

Department of Finance & Administration



MEETING DATE: May 19, 2026  
 SUBJECT: Farmer's Market of Bluffton: 2026 Facilities Supplemental  
 PROJECT MANAGER: Jeremy Bullock, Grants Administrator

Summarized below is the application from the Farmer's Market of Bluffton for Accommodations Tax grant dollars to supplement their previous 2026 Market Season award. This request is to assist with increased facility fees.

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

**Total Budget:** \$182,150  
**Requested Amount:** \$9,375  
**Percentage of Request^:** 5.1%

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

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Budget per Category (based on Budget Form), corrected as needed	
Advertising & Promotion of Tourism or Arts and Cultural Events	\$54,000	
Facilities for Civic and Cultural Events	21,875**	
Public Facilities	-	*
Municipality and County Services	-	*
Tourist Transportation	-	*
Other/Ineligible Project Expenses	106,275	
<b>Total</b>	<b>\$182,150</b>	

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

### Budgeted Expenses Summary:

#### Advertising & Promotion:

Total Budget: \$54,000

- Previously awarded during December 2025 Town Council meeting

#### Facilities for Civic and Cultural Events:

Total Budget: \$21,875\*\*

- Of this total, \$9,375 is being requested as supplemental funding to their 2026 Market Season Award to cover increased facility rental fees.

#### Public Facilities

Total Budget: \$0

- Funds budgeted for Facility Support is moved to "Facilities for Civic and Cultural Events" on the chart above; previously awarded during December 2025 Town Council meeting.

Other/Ineligible Project Expenses:

Total Budget:

- N/A; part of application originally considered during December 2025 Town Council meeting

**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
\$9,375	7	5	4	4	4	4	28	

Advertising: N/A; part of application originally considered during December 2025 Town Council meeting

Festival/Event: Weekly event held every Thursday to attract and provide for tourists; in 2026, will be held from January 8th to December 17th

Bluffton Event: Held in Old Town Bluffton at Martin Family Park with overflow space provided at the Heyward House Common Grounds.

Tourism Draw %: Approximately 75%; data is collected informally by taking sample verbal zip code surveys at different times and different seasons when volunteers are available.

Benefit to Tourism: Market Day, held each Thursday, brings tourists from across the region who also explore local shops, restaurants and Bluffton’s historic charm.

Self-Sufficiency % (Financial Need): N/A; part of application originally considered during December 2025 Town Council meeting

**Previous Funding Amounts**

Fiscal Year	Requested Amount	% of Budget	Advisory Committee Recommendation	Town Council Approved	Expended	Lapsed	Comments
2025	\$55,300	38%	\$55,300	\$55,300	\$35,017	\$20,283	Final Report Submitted
2024	\$55,300	38%	\$55,300	\$55,300	\$32,360	\$22,940	Final Report Submitted
2023	\$50,500	40%	\$50,500	\$50,500	\$34,360	\$16,140	Final Report Submitted

Accommodations Tax Committee Recommendations and Comments:

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The Committee recommends funding \$ 9,375 for supplemental facilities support during the 2026 Market Season.

**Bullock, Jeremy**

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**From:** noreply@civicplus.com  
**Sent:** Wednesday, March 11, 2026 10:19 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

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## TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

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

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

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(Section Break)

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Application Date 3/11/2026

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Project Name Farmers Market of Bluffton

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Project/Event Location Martin Family Park

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Is this a new project or event? No

---

Project/Event Start Date: 1/1/2026

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Project/Event End Date 12/31/2026

---

Multi-Year Project/Event? Yes

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Total Project Costs	additional 9,375
Total ATAX Funds Requested	additional 9,375
Percent of Total Budget	additional 9,375
Date the funds are needed:	1/1/2026
Full Legal Organization Name	Farmers Market Bluffton
Address	PO Box 447
Street Address Line 2	<i>Field not completed.</i>
City	Bluffton
State	SC
Zip Code	29910
Applicant must be designated as a non-profit entity to receive ATAX funds. Is your entity a non-profit organization?	Yes

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

Organization Primary Point of Contact

First Name	Klm
Last Name	Viljac
Title	Executive Director
Phone Number	8434152447
E-mail Address	<a href="mailto:manager@farmersmarketbluffton.org">manager@farmersmarketbluffton.org</a>

(Section Break)

Organization Secondary Point of Contact

First Name	<i>Field not completed.</i>
------------	-----------------------------

Last Name *Field not completed.*

---

Title *Field not completed.*

---

Phone Number *Field not completed.*

---

E-mail Address *Field not completed.*

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**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

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Project Description: Martin Family Park rental fees

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

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

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

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

Impact on or Benefit to Tourism: see original application

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

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

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Additional Comments: *Field not completed.*

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**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

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**FINANCIAL INFORMATION**

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

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

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

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

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Most Recent Fiscal Year Balance Sheet and Profit and Loss Accounting Statement [2025 Stmt of Activity Jan - August.pdf](#)

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Financial Guarantee [FM Board Minutes 9.23.25.pdf](#)

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

---

Please attach Budget vs. Actual statements for prior two years events. [2024 Statement of Financial Position.pdf](#)

---

Please attach Budget vs. Actual statements for prior two years events. *Field not completed.*

---

(Section Break)

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

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

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

**PRIOR RECIPIENT'S REPORT**

If your organization has received ATAX funding from the Town of Bluffton in previous years, you must complete the below information.

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

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

Project/Event Name Farmers Market of Bluffton

Year Awarded 2025

Amount Awarded 2025

Was a final report submitted? Yes

What was the total number of tourists? see original application

What was the percentage of tourists? see original application

(Section Break)

Please attach a copy of [Nonprofit status proof.pdf](#)  
 your organization's IRS  
 Designation Letter  
 showing your non-profit  
 status .

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

Additional Application Documents *Field not completed.*

Additional Application Documents *Field not completed.*

Additional Application Documents *Field not completed.*

Additional Application Documents *Field not completed.*

Additional Comments *Field not completed.*

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

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

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

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

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

---

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

---

Signature	Kim Viljac
Signatory's Title or Position	Executive Director

---

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



FEDERAL REVENUE SERVICE  
BOX 2508  
CINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Exhibit B

Date: FEB 12, 2013  
FARMERS MARKET OF BLUFFTON INC  
PO BOX 447  
BLUFFTON, SC 29910

Employer Identification Number:  
26-2645371  
DLN:  
17053093357002  
Contact Person:  
ANDREA SPECK ID# 95044  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
December 31  
Public Charity Status:  
170(b)(1)(A)(vi)  
Form 990 Required:  
Yes  
Effective Date of Exemption:  
May 21, 2008  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.


Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Letter 947 (DO/CG)

# License Search

Select Type

Business Name 

Name of Business

Farmers Market of Blu

Search

1 license listed. [Export to Excel](#)

License No 25-05-0553

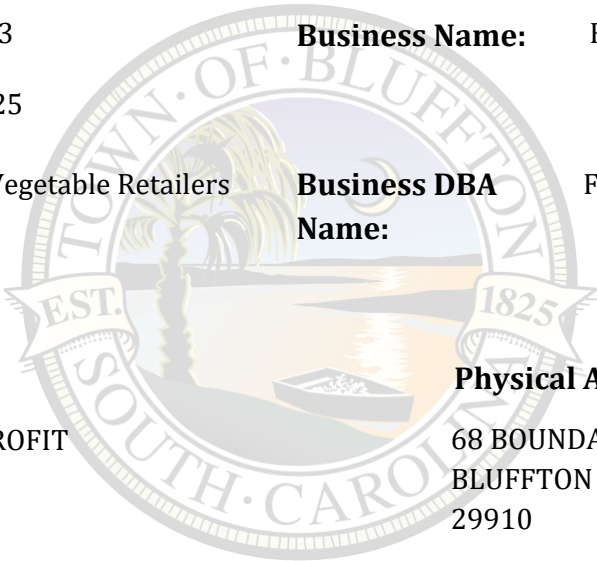
Farmers Market of Bluffton

Issued

# TOWN OF BLUFFTON

## TOWN OF BLUFFTON - Expires:04/30/2026

<b>License No.</b>	25-05-0553	<b>Business Name:</b>	Farmers Market of Bluffton
<b>Date Issued:</b>	05/20/2025		
<b>NAICS Title:</b>	Fruit and Vegetable Retailers	<b>Business DBA Name:</b>	Farmers Market of Bluffton
<b>Business Type:</b>	FARMERS MARKET - NON PROFIT	<b>Physical Address:</b>	68 BOUNDARY ST UNIT 1 BLUFFTON SC 29910

The seal of the Town of Bluffton, South Carolina, is centered in the background. It features a circular design with a palm tree on the left, a boat on the water in the center, and a banner at the bottom that reads "EST. 1825". The words "TOWN OF BLUFFTON" are arched across the top, and "SOUTH CAROLINA" is arched across the bottom.

**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.

Kim Viljac  
Farmers Market of Bluffton  
P.O. Box 447  
Bluffton, SC 29910

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

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

**REVENUES**

**Revenues - Cash**

	Sponsorships	\$	12,875
	Donations	\$	
	ATAX Grants/Funding from Other Entities*	\$	66,500
<i>* Do <b>NOT</b> include anticipated award funds requested in this application</i>			
Other Grants (please name): AgSouth		\$	5,000
Other Grants (please name):		\$	
Other Grants (please name):		\$	
	Vendor Fees	\$	
	Registration Fees	\$	
Other Fees (please name): Tent and Table Rentals		\$	1,000
Other Fees (please name):		\$	
	Mercandise Sales	\$	7,000
Other Sales (please name):		\$	
Other Sales (please name):		\$	
Other Revenue (please name):		\$	
Other Revenue (please name):		\$	
 <b>Revenues - In-Kind Contributions</b>			
	Volunteer Hours	\$	
	Donated Items	\$	
	Donated Services	\$	
Other (please name): Entertainment, Equipment Storage, Office Space		\$	30,950
Other (please name):		\$	
Other (please name):		\$	
<b>Total All Revenue Sources:</b>		<b>\$</b>	<b>123,325</b>

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

**EXPENSES**

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

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

	<b>Amount</b>
<b>Advertising &amp; Promotion of Tourism or Arts and Cultural Events</b>	
Local Newspaper/Digital Advertising	\$ _____
Regional Newspaper/Digital Advertising	\$ _____
National Newspaper/Digital Advertising	\$ _____
Local Magazine/Digital Advertising	\$ 18,000
Regional Magazine/Digital Advertising	\$ 5,000
National Magazine/Digital Advertising	\$ _____
Local Radio Advertising	\$ _____
Regional Radio Advertising	\$ _____
National Radio Advertising	\$ _____
Local Television Advertising	\$ _____
Regional Television Advertising	\$ _____
National Television Advertising	\$ _____
Billboards	\$ 2,500
Social Media Advertising	\$ 1,132
E-mail and/or Text Blasts	\$ 4,700
Postcards/Mailers	\$ _____
Posters/Banners/Signage	\$ 3,000
Graphic Design of Marketing/Writing or Press Releases	\$ 18,000
Web Hosting for <b>Event</b> (not organization)	\$ 1,668
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
<b>Total Advertising/Promotion Budget:</b>	<b>\$ 54,000</b>
<b>Facilities for Civic and Cultural Events</b>	
Rentals: Venue(s)	\$ _____
Rentals: Parking Lots	\$ _____
Rentals: Tables, Chairs, Stages, Tents	\$ _____
Rental: Sound, Audio Equipment	\$ _____
Construction/Renovations/Repairs of Buildings/Facilities	\$ _____
Other (please name): Heyward House	\$ 7,500
Other (please name): Martin Family Park	\$ 9,375
Other (please name): _____	\$ _____
<b>Total Facilities Budget:</b>	<b>\$ 16,875</b>

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

**EXPENSES**

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

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

	<b>Amount</b>
<b>Tourist Transportation</b>	
Company Name: _____	\$ _____
Company Name: _____	\$ _____
<b>Total Transportation Budget:</b>	\$ _____ 0
<b>Public Facilities</b>	
Temporary/Portable Restrooms	\$ _____
Dumpster Rental/Trash Hauling	\$ _____
Construction of Permanent Restrooms	\$ _____
Construction of Parks	\$ _____
Construction of Parking Lots	\$ _____
Other (please name): Facility Support (tents, table, cones, safety signage)	\$ _____ 5,000
Other (please name): _____	\$ _____
<b>Total Public Facilities Budget:</b>	\$ _____ 5,000
<b>Municipality and County Services</b>	
Security Provided by Bluffton Police Department	\$ _____
Security <b>NOT</b> Provided by Bluffton Police Department	\$ _____
<b>Total Municipality/County Services Budget:</b>	\$ _____ 0
<b>Operations <i>(only applicable to Visitor Centers and/or Cultural Centers/Museums)</i></b>	
Marketing/Advertising	\$ _____
Utilities <i>(electric, gas, water, phone service, internet, etc.)</i>	\$ _____
Subscriptions <i>(not related to marketing/advertising services)</i>	\$ _____
Supplies <i>(office, janitorial, etc.)</i>	\$ _____
Facility Maintenance <i>(i.e. cleaning, pest control, landscaping, etc.)</i>	\$ _____
Minor Repairs	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
<b>Total Operations Budget:</b>	\$ _____ 0
<b>Total ALL ATAX Eligible Expenses:</b>	\$ _____ 75,875



# Farmer's Market of Bluffton, Inc.

## Statement of Financial Position

As of December 31, 2024

	TOTAL	
	AS OF DEC 31, 2024	AS OF DEC 31, 2023 (PY)
<b>ASSETS</b>		
Current Assets		
Bank Accounts		
Checking at Wells Fargo	4,144.13	9,965.82
Savings at Wells Fargo	168.25	168.25
<b>Total Bank Accounts</b>	<b>\$4,312.38</b>	<b>\$10,134.07</b>
Other Current Assets		
Town of Bluffton A-TAX Rec 2023	0.00	15,124.12
Town of Bluffton A-TAX Rec 2024	4,499.08	
<b>Total Other Current Assets</b>	<b>\$4,499.08</b>	<b>\$15,124.12</b>
<b>Total Current Assets</b>	<b>\$8,811.46</b>	<b>\$25,258.19</b>
Fixed Assets		
Office Equipment	1,499.31	1,499.31
Trailer	2,850.00	2,850.00
zAccumulated Depreciation	-2,354.00	-1,784.00
<b>Total Fixed Assets</b>	<b>\$1,995.31</b>	<b>\$2,565.31</b>
<b>TOTAL ASSETS</b>	<b>\$10,806.77</b>	<b>\$27,823.50</b>
<b>LIABILITIES AND NET ASSETS</b>		
Liabilities		
Current Liabilities		
Other Current Liabilities		
EIDL Loan	4,000.00	6,800.00
Loan Payable - Kim	2,950.00	2,850.00
<b>Total Other Current Liabilities</b>	<b>\$6,950.00</b>	<b>\$9,650.00</b>
<b>Total Current Liabilities</b>	<b>\$6,950.00</b>	<b>\$9,650.00</b>
<b>Total Liabilities</b>	<b>\$6,950.00</b>	<b>\$9,650.00</b>
Net Assets		
Net Assets With Restrictions	0.00	7,964.37
Net Assets Without Restrictions	14,666.65	-4,272.80
Net Revenue	-10,809.88	14,481.93
<b>Total Net Assets</b>	<b>\$3,856.77</b>	<b>\$18,173.50</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$10,806.77</b>	<b>\$27,823.50</b>

# Farmer's Market of Bluffton, Inc.

## Statement of Activity

January - August, 2025

	NET ASSETS WITH RESTRICTIONS	NET ASSETS WITHOUT RESTRICTIONS	TOTAL
<b>Revenue</b>			
Income			\$0.00
Grants			\$0.00
ATAX Grant			\$0.00
ATAX - Advertising	15,801.51		\$15,801.51
ATAX - Facility Support	219.98		\$219.98
ATAX - Usage/Rent	4,950.00		\$4,950.00
<b>Total ATAX Grant</b>	<b>20,971.49</b>		<b>\$20,971.49</b>
<b>Total Grants</b>	<b>20,971.49</b>		<b>\$20,971.49</b>
Merchandise		4,743.85	\$4,743.85
Sponsorship			\$0.00
Contracted Sponsors		5,000.00	\$5,000.00
Daily Sponsorship		5,075.00	\$5,075.00
<b>Total Sponsorship</b>		<b>10,075.00</b>	<b>\$10,075.00</b>
Tent/Table Revenue		515.00	\$515.00
Vendor Revenue			\$0.00
Farmer Vendor		10,660.00	\$10,660.00
Food Vendor		24,770.00	\$24,770.00
<b>Total Vendor Revenue</b>		<b>35,430.00</b>	<b>\$35,430.00</b>
<b>Total Income</b>	<b>20,971.49</b>	<b>50,763.85</b>	<b>\$71,735.34</b>
Rev Released from Restrictions	-18,371.33	18,371.33	\$0.00
<b>Total Revenue</b>	<b>\$2,600.16</b>	<b>\$69,135.18</b>	<b>\$71,735.34</b>
<b>GROSS PROFIT</b>	<b>\$2,600.16</b>	<b>\$69,135.18</b>	<b>\$71,735.34</b>
<b>Expenditures</b>			
Marketing and Promotions			\$0.00
Constant Contact Newsletter		1,322.17	\$1,322.17
Print Advertisements		13,010.50	\$13,010.50
Social Media		1,772.09	\$1,772.09
Web Design and Maintenance		1,112.00	\$1,112.00
<b>Total Marketing and Promotions</b>		<b>17,216.76</b>	<b>\$17,216.76</b>
Operations Expense			\$0.00
Bank Charges		10.00	\$10.00
Contract Labor			\$0.00
Accounting Services		1,200.00	\$1,200.00
Casual Labor		4,657.00	\$4,657.00
Market Manager		28,776.64	\$28,776.64
<b>Total Contract Labor</b>		<b>34,633.64</b>	<b>\$34,633.64</b>
Depreciation Expense		380.00	\$380.00

# Farmer's Market of Bluffton, Inc.

## Statement of Activity

January - August, 2025

	NET ASSETS WITH RESTRICTIONS	NET ASSETS WITHOUT RESTRICTIONS	TOTAL
Facility Support			\$0.00
Market Equipment Expense		636.67	\$636.67
Property Usage/Rent		7,800.00	\$7,800.00
<b>Total Facility Support</b>		<b>8,436.67</b>	<b>\$8,436.67</b>
Insurance		310.00	\$310.00
Licenses/Permits		1,020.00	\$1,020.00
Market Merchandise			\$0.00
Market Merchandise to be Sold		2,026.39	\$2,026.39
<b>Total Market Merchandise</b>		<b>2,026.39</b>	<b>\$2,026.39</b>
Market Supplies		57.47	\$57.47
Membership Dues		490.00	\$490.00
Office Equipment/Software		519.92	\$519.92
Office Supplies		323.11	\$323.11
Phone		1,179.34	\$1,179.34
Postage		264.74	\$264.74
<b>Total Operations Expense</b>		<b>49,651.28</b>	<b>\$49,651.28</b>
Over/Short		45.00	\$45.00
<b>Total Expenditures</b>	<b>\$0.00</b>	<b>\$66,913.04</b>	<b>\$66,913.04</b>
NET OPERATING REVENUE	<b>\$2,600.16</b>	<b>\$2,222.14</b>	<b>\$4,822.30</b>
Other Revenue			
Other Income		520.00	\$520.00
<b>Total Other Revenue</b>	<b>\$0.00</b>	<b>\$520.00</b>	<b>\$520.00</b>
NET OTHER REVENUE	<b>\$0.00</b>	<b>\$520.00</b>	<b>\$520.00</b>
NET REVENUE	<b>\$2,600.16</b>	<b>\$2,742.14</b>	<b>\$5,342.30</b>



## Farmers Market of Bluffton, Board of Directors Meeting

### 9.23.25 Minutes

In attendance: Sarah Clemmons - Vice President, Kate Creech - Secretary, Meg James - Treasurer/Finance Chair, Bill Beltz - Immediate Past President, Kim Viljac - Director of Farmers Market

Meeting called to order at 6:20pm by Kate. Sarah seconds

August meeting minutes approved

Next meeting: October 21st (TBD Manor or Kate's house)

Adjournment at 7:30pm - Kate motions - Meg seconds

Board unanimously votes to approve and the responsibility of 2026 budget

#### I. Board Members

- A. Rebekah has resigned. Discussion of hiring her as marketing employee (atax)

#### II. Market Updates

- A. Vendors (in general - maxed out on baked goods vendors)
  - 1. Southern Peel is back at the Heyward House property. With event season they will not be able to attend every market
  - 2. Two Birds (greek food), Daniel (macarons), Earth Fed (plant based cheese), Sweets Obsessed, Sour Loaf, Jack's Vanilla Beans - All are doing great and have received a wonderful response from market shoppers
  - 3. Discussion of adjusting hours for market days during Fall/Winter as some shoppers are arriving at 11am when vendors are still setting up. This is mostly due to these shoppers being used to the summer hours of 10am-2pm.
    - a) Marketing idea on social media to express how the market typically slows down after 2:30pm so parking is much easier. The goal of this is to bring in more traffic for vendors between 3pm-4pm during fall winter hours

B. Events/PR/Merch

1. Pops in the Park - Kim has contacted Mary O'neill. Market will close at 3pm for event
2. Halloween trick or treating scheduled for October 23rd
3. Thanksgiving - will have market Wednesday before thanksgiving
4. Christmas - last market will be December 18th. Will reopen on January 8th
  - a) Mention of costumes during Christmas market and possibly entering the Christmas parade - vendors could supply some of their goods so we could hand out during parade
5. Ordering beanies from John - jewel tones with Farmers Market applique
6. Discussion of ordering magnets with seasonal market hours and QR code
7. Suggestion of using Facebook Business Suite to schedule social media posts including weather related updates
8. Amiri rendering poster that can be used for a variety of market signage, announcements, etc.

III. Website - working on updating vendor bios

IV. Sponsors - huge success! Two for the previous market!

V. Funding

- A. AG South Grant - will know in November. \$5k non-restricted
  1. Desired use if for kids programs
- B. Donation of \$1k from Bill

VI. Budget

- A. Approval for Nikki raise
- B. Board unanimously votes to approve and the responsibility of 2026 budget

Tasks for next meeting:

- Everyone to review bylaws and Rebekah's marketing proposal for discussion at next meeting
- By law updated verbiage to include description and use of AI for notes
- Kim contacting Tabor to be attorney for updated by laws

**Farmers Market of Bluffton, Inc.  
Budget  
For Year 2023**

ATTN: Section X. Item #6.

**INCOME**

Grants			
ATAX Grant-Town of Bluffton			
ATAX - Advertising	38,000.00		
ATAX - Facility Support	5,000.00		
ATAX - Heyward House	<u>7,500.00</u>		
Total ATAX Bluffton Grant		50,500.00	
Donations In Kind**			
Entertainment	12,500.00		
Equipment Storage	2,400.00		
Martin Family Park Property	7,500.00		
Office Expense	<u>1,800.00</u>		
Total Donations In Kind		24,200.00	
Sponsorship			
Contracted Sponsors	5,000.00		
Daily Sponsorship	<u>5,250.00</u>		
Total Sponsorship		10,250.00	
Tent/Table Revenue		1,000.00	
Vendor Revenue			
Farm Vendor	14,000.00		
Food Vendor	<u>20,500.00</u>		
Total Vendor Revenue		34,500.00	
Sales of Merchandise		<u>6,000.00</u>	
<b>TOTAL INCOME</b>			<u>126,450.00</u>

ATAX BUDGET	
Item:	
Facility Support	5,000.00
Property Usage	<u>7,500.00</u>
	12,500.00
Advertising per month	<u>3,166.67</u>
	38,000.00
<b>TOTAL ATAX</b>	<u><b>50,500.00</b></u>

MARKET FUNDING SNAPSHOT	
ATAX-Bluffton	50,500.00
Donations in Kind	24,200.00
Sponsors	10,250.00
Market Revenues	<u>41,500.00</u>
Total	<u>126,450.00</u>
<b>ATAX Funding</b>	<b>40%</b>

**EXPENSES**

Advertising	38,000.00
Facility Support	5,000.00
Heyward House Rental	7,500.00
Entertainment	12,500.00
Equipment Storage	2,400.00
Martin Family Park Property	7,500.00
Office Expense	1,800.00
Bank Charges	160.00
Contract Labor: Accounting Services	1,500.00
Casual Labor	6,000.00
Market Manager	36,750.00
Cost of Merchandise	1,850.00
Insurance	1,000.00
Market Supplies	650.00
Membership Dues	440.00
Office Equipment/Software Expense	750.00
Office Supplies	650.00
Phone	1,800.00
Postage	200.00

501C3 GUIDELINE:	
Total Donations	84,950.00
Total Funding	126,450.00
<b>Donation %</b>	<b>69%</b>

\*\*These are expected donated services based on prior years

**TOTAL EXPENSES** 126,450.00

# Farmer's Market of Bluffton, Inc.

## Budget vs. Actuals: Budget\_FY23\_P&L\_1 - FY23 P&L

January - December 2023

	TOTAL	
	ACTUAL	BUDGET
Revenue		
Income		
Donations In Kind		
Entertainment	12,500.00	12,500.00
Equipment Storage	2,400.00	2,400.00
Office Expense	1,800.00	1,800.00
Property Usage	7,500.00	7,500.00
<b>Total Donations In Kind</b>	<b>24,200.00</b>	<b>24,200.00</b>
Grants		
ATAX Grant		
ATAX - Advertising	33,043.99	38,000.00
ATAX - Facility Support	4,135.82	5,000.00
ATAX - Usage/Rent	10,500.00	7,500.00
<b>Total ATAX Grant</b>	<b>47,679.81</b>	<b>50,500.00</b>
<b>Total Grants</b>	<b>47,679.81</b>	<b>50,500.00</b>
Interest Income	0.20	
Merchandise	7,833.00	6,000.00
Sponsorship		
Contracted Sponsors	5,000.00	5,000.00
Daily Sponsorship	2,100.00	5,250.00
<b>Total Sponsorship</b>	<b>7,100.00</b>	<b>10,250.00</b>
Tent/Table Revenue	795.00	1,000.00
Vendor Revenue		
Farmer Vendor	12,975.00	14,000.00
Food Vendor	28,615.00	20,500.00
<b>Total Vendor Revenue</b>	<b>41,590.00</b>	<b>34,500.00</b>
<b>Total Income</b>	<b>129,198.01</b>	<b>126,450.00</b>
Rev Released from Restrictions		
Restrictions Satisfied by Payme	0.00	
<b>Total Rev Released from Restrictions</b>	<b>0.00</b>	
Uncategorized Income	930.00	
<b>Total Revenue</b>	<b>\$130,128.01</b>	<b>\$126,450.00</b>
<b>GROSS PROFIT</b>	<b>\$130,128.01</b>	<b>\$126,450.00</b>
Expenditures		
Credit Card Fees	-235.36	
Gift Certificate	25.00	
Marketing and Promotions		38,000.00
Constant Contact Newsletter	548.50	
Print Advertisements	22,540.78	
Social Media	3,336.08	
Web Design and Maintenance	1,668.00	

# Farmer's Market of Bluffton, Inc.

## Budget vs. Actuals: Budget\_FY23\_P&L\_1 - FY23 P&L

January - December 2023

	TOTAL	
	ACTUAL	BUDGET
<b>Total Marketing and Promotions</b>	<b>28,093.36</b>	<b>38,000.00</b>
Operations Expense		
Bank Charges	45.00	160.00
Contract Labor		
Accounting Services	1,800.00	1,500.00
Casual Labor	6,510.00	6,000.00
Market Manager	37,443.52	36,750.00
<b>Total Contract Labor</b>	<b>45,753.52</b>	<b>44,250.00</b>
Depreciation Expense	434.00	
Facility Support		5,000.00
Market Equipment Expense	1,782.69	
Property Usage/Rent	7,800.00	7,500.00
<b>Total Facility Support</b>	<b>9,582.69</b>	<b>12,500.00</b>
Insurance	310.00	1,000.00
Licenses/Permits	420.00	
Market Merchandise		
Market Merchandise to be Sold	2,818.93	1,850.00
<b>Total Market Merchandise</b>	<b>2,818.93</b>	<b>1,850.00</b>
Market Supplies	509.82	650.00
Membership Dues	180.00	440.00
Office Equipment/Software	597.37	750.00
Office Supplies	428.76	650.00
Phone	2,237.62	1,800.00
Postage	242.37	200.00
<b>Total Operations Expense</b>	<b>63,560.08</b>	<b>64,250.00</b>
Over/Short	3.00	
<b>Total Expenditures</b>	<b>\$91,446.08</b>	<b>\$102,250.00</b>
<b>NET OPERATING REVENUE</b>	<b>\$38,681.93</b>	<b>\$24,200.00</b>
Other Expenditures		
Donation Usage		
Entertainment	12,500.00	12,500.00
Equipment Storage	2,400.00	2,400.00
Office Expense	1,800.00	1,800.00
Property Use	7,500.00	7,500.00
<b>Total Donation Usage</b>	<b>24,200.00</b>	<b>24,200.00</b>
<b>Total Other Expenditures</b>	<b>\$24,200.00</b>	<b>\$24,200.00</b>
<b>NET OTHER REVENUE</b>	<b>\$ -24,200.00</b>	<b>\$ -24,200.00</b>
<b>NET REVENUE</b>	<b>\$14,481.93</b>	<b>\$0.00</b>

**Farmers Market of Bluffton, Inc  
Budget to Actual  
For Year 2024**

<b>INCOME</b>	<b>Budget</b>	<b>Actual</b>	<b>Difference</b>	
Grants				
ATAX Grant-Town of Bluffton				
ATAX - Advertising	42,800.00	21,507.53		
ATAX - Facility Support	5,000.00	7,200.00		
ATAX - Heyward House	7,500.00	-		
Total ATAX Bluffton Grant	55,300.00	28,707.53	26,592.47	
Donations in Kind**				
Entertainment	12,500.00	-		
Equipment Storage	2,400.00	-		
Martin Family Park Property	7,500.00	-		
Office Expense	1,800.00	-		
Total Donations in Kind	24,200.00	-	24,200.00	
Sponsorship				
Contracted Sponsors	5,000.00			
Daily Sponsorship	5,250.00	1,370.00		
	10,250.00	1,370.00	8,880.00	
Tent/Table Revenue		1,000.00	655.00	345.00
Vendor Revenue				
Farm Vendor	14,000.00	12,300.00		
Food Vendor	25,100.00	25,160.00		
Total Vendor Revenue	39,100.00	37,460.00	1,640.00	
Sales of Merchandise	7,000.00	7,125.01	(125.01)	
<b>TOTAL INCOME</b>	<b>136,850.00</b>	<b>75,317.54</b>	<b>61,532.46</b>	
<b>EXPENSES</b>				
Advertising	42,800.00	23,832.92		
Facility Support	5,000.00	6,383.90		
Heyward House Rental	7,500.00	-		
Entertainment	12,500.00	500.00		
Equipment Storage	2,400.00	-		
Martin Family Park Property	7,500.00	-		
Office Expense	1,800.00	584.82		
Bank Charges	160.00	90.00		
Contract Labor: Accounting Services	2,100.00	1,800.00		
Casual Labor	6,000.00	6,060.00		
Market Manager	39,947.00	37,106.72		
Cost of Merchandise	3,000.00	2,917.02		
Insurance	1,000.00	1,060.00		
Market Supplies	1,303.00	397.97		
Membership Dues	440.00	1,150.00		
Office Equipment/Software Expense	750.00	819.86		
Office Supplies	650.00	267.18		
Phone	1,800.00	2,585.23		
Postage	200.00	5.80		
<b>TOTAL EXPENSES</b>	<b>136,850.00</b>	<b>85,561.42</b>	<b>51,288.58</b>	

<b>ATAX BUDGET</b>	
Item:	
Facility Support	5,000.00
Property Usage	7,500.00
	12,500.00
Advertising per month	3,566.67
	42,800.00
<b>TOTAL ATAX</b>	<b>55,300.00</b>

<b>MARKET FUNDING SNAPSHOT</b>	
ATAX-Bluffton	55,300.00
Donations in Kind	24,200.00
Sponsors	10,250.00
Market Revenues	47,100.00
TOTAL	136,850.00
<b>ATAX Funding 41%</b>	

<b>501C3 GUIDELINE:</b>	
Total Donations	89,750.00
Total Funding	136,850.00
	0
<b>Donation % 66%</b>	

\*\*These are expected donated services based on prior years.

TOWN OF BLUFFTON ATAX GRANT APPLICATION SCORING SHEET

Entity: **The Farmer's Market of Bluffton**

Project: **2026 Market Season Supplemental**

Project Type: **Event/Festival**

Scoring Category	Points Possible	Points Awarded
<b>ADVERTISING</b>	<b>15</b>	
<b>Part 1: Five (5) points possible. Based on how much of the requested funds go toward advertising.</b>		
0% of funds go toward advertising	0 points	
1% - 20% of funds go toward advertising	1 point	
21% - 40% of funds go toward advertising	2 points	
41% - 60% of funds go toward advertising	3 points	
61% - 80% of funds go toward advertising	4 points	
81% - 100% of funds go toward advertising	5 points	
<b>Part 2: Ten (10) points possible. Based on where the advertising is placed.</b>		
None of the funds go toward advertising	0 points	
Local newspapers/periodicals and electronic advertising (ex. Island Packet, The Bluffton Sun)	2 points	
Local guides/periodicals specifically geared toward tourists with a shelf life of more than 30 days	4 points	
Larger regional publications and electronic marketing within 100 miles (ex. Charleston or Savannah news outlets)	6 points	
Newspapers/periodicals/electronic marketing to large, metropolitan areas outside of 100 miles away (ex. Atlanta, Charlotte, Washington, D.C., Chicago)	8 points	
Nationally distributed newspapers/periodicals/electronic marketing (ex. USA Today, NY Times, Southern Living Magazine)	10 points	
<b>TOURIST FACILITIES</b>	<b>15</b>	
Higher point value given based on anticipated ratio of tourists to locals		
<b>FESTIVAL/EVENT</b>	<b>5</b>	
Higher point value given to requests for festivals or events		
Length of event/festival should be considered. Is it an all-day event versus a two-hour event? Multi-day event?		
<b>BLUFFTON EVENT</b>	<b>5</b>	
Higher point value given to events held within the town limits of Bluffton and/or spanning multiple locations		
<b>TOURISM DRAW</b>	<b>5</b>	
0% of attendees are tourists based on historical or projected information	0 points	
1% - 20% of attendees are tourists based on historical or projected info	1 point	
21% - 40% of attendees are tourists based on historical or projected info	2 points	
41% - 60% of attendees are tourists based on historical or projected info	3 points	
61% - 80% of attendees are tourists based on historical or projected info	4 points	
81% - 100% of attendees are tourists based on historical or projected info	5 points	
<b>BENEFIT TO TOURISM (LOCAL ECONOMY)</b>	<b>5</b>	
Higher point value given to events that encourage overnight stays and/or have local business participation		
<b>SELF SUFFICIENCY</b>	<b>5</b>	
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	
<b>MISCELLANEOUS</b>	<b>10</b>	
Only use if applicant does not qualify as a festival/event		
<b>Group Average Point Total (out of a possible 40 points)</b>		<b>0</b>
<b>Group Average Percentage</b>		



**ACCOMMODATIONS TAX ADVISORY COMMITTEE  
STAFF REPORT  
Department of Finance & Administration**

MEETING DATE: May 19, 2026  
 SUBJECT: Hilton Head Symphony Orchestra: 2026 Bluffton Concerts  
 PROJECT MANAGER: Jeremy Bullock, Grants 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 2026 Bluffton Concerts.

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

**Total Budget: \$100,074**  
**Requested Amount: \$46,818**  
**Percentage of Request^: 46.78%**

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

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Budget per Category (based on Budget Form), corrected as needed	
Advertising & Promotion of Tourism or Arts and Cultural Events	\$13,071	
Facilities for Civic and Cultural Events	33,012	
Public Facilities	734	*
Municipality and County Services	-	*
Tourist Transportation	-	*
Other/Ineligible Project Expenses	53,256	
<b>Total</b>	<b>\$100,073</b>	

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

**Budgeted Expenses Summary:**

Advertising & Promotion:

Total budget \$13,071

- Print and broadcast media (in coordination with the Historic Arts & Seafood Festival marketing for the October concert), graphic design, printed program, brochures and a social media campaign.

Facilities for Civic and Cultural Events:

Total budget \$33,012

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

Public Facilities:

Total budget \$734

- Port-o-Lets rental

Other/Ineligible Project Expenses:

Total budget \$53,256

- 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 Requested	Advertising (15)	Festival / Event (5)	Bluffton Event (5)	Tourism Draw % (5)	Benefit to Tourism (5)	Self-Sufficiency % (5)	Total of 40 possible	Comments
\$46,818	8	4	4	2	5	3	27	

Advertising: Of the requested funds, approximately 27.9% is related to advertising and promotion. Advertising is planned for Local Life magazine, The Bluffton Sun, The Hilton Head Sun, TV ads on WHHI, season brochures and rack cards distributed at the Savannah/Hilton Head International Airport and all SC interstate welcome centers and rest areas, monthly rack cards additionally distributed to area hotels, vacation rental offices, restaurants, retail spaces, posters, email blasts, social media posts, event listings on the HHSO and Arts & Seafood web sites, and online calendars including the HHI-Bluffton Chamber of Commerce, HHI Town Website, Office of Cultural Affairs and Local Life’s online “The Scene”.

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 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 46.3% of HHSO’s total projected events budget of \$100,074. Other sources of income include sponsorships, donations, ticket sales, and contributions from HHSO funds.

Previous Funding Amounts							
Fiscal Year	Requested Amount	% of Budget	Advisory Committee Recommendation	Town Council Approved	Expended	Lapsed	Comments
2025	\$48,781	50%	\$48,781	\$48,781	\$39,499	\$9,282	2025 Bluffton Concerts
2024	\$43,632	49%	\$43,632	\$43,632	\$39,894	\$3,738	2024 Bluffton Concerts
2023	\$48,628	54%	\$48,628	\$48,628	\$40,497	\$8,131	2023 Bluffton Concerts

Accommodations Tax Committee Recommendations and Comments:  
none

The Committee recommends funding \$ 46,818 for the 2026 Bluffton Concerts.

**Bullock, Jeremy**

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**From:** noreply@civicplus.com  
**Sent:** Monday, March 30, 2026 1:13 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

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## TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

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

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

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Application Date 3/30/2026

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Project Name Hilton Head Symphony Orchestra 2026 Bluffton Concerts

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Project/Event Location Martin Family Park; St. Gregory the Great Catholic Church Parish Life Center

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Is this a new project or event? No

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Project/Event Start Date: 7/1/2026

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Project/Event End Date 12/15/2026

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Multi-Year Project/Event?	No
Total Project Costs	\$100,074
Total ATAX Funds Requested	\$46,818
Percent of Total Budget	46.78%
Date the funds are needed:	12/31/2026
Full Legal Organization Name	Hilton Head Symphony Orchestra, Inc.
Address	7 Lagoon Road, Suite 100
Street Address Line 2	<i>Field not completed.</i>
City	Hilton Head Island
State	SC
Zip Code	29928
Applicant must be designated as a non-profit entity to receive ATAX funds. Is your entity a non-profit organization?	Yes

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

Organization Primary Point of Contact

First Name	Alan
Last Name	Jordan
Title	President and CEO
Phone Number	(843) 842-2055
E-mail Address	<a href="mailto:ajordan@hhsso.org">ajordan@hhsso.org</a>

(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	<i>Field not completed.</i>

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

**Project Description:** The Hilton Head Symphony Orchestra will present two concerts in Bluffton during 2026 as part of its 2026-2027 45th Anniversary concert season. On Thursday, October 15, 2026, 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 sixth such annual partnership. On Saturday, November 28, 2026, 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. A vocal soloist will be engaged and the Hilton Head Symphony Orchestra Chorus will be featured during the Holiday Pops Concert.

**List any required permits, if applicable. If none, type “N/A”:** (required permits will be secured by Historic Bluffton Arts and Seafood Festival for the October 15, 2026, concert)

**Describe all planned advertising and marketing for this project/event:** The two concerts will be promoted widely, through print and broadcast media (in coordination with Historic Bluffton Arts and Seafood Festival marketing for the October concert) and through an aggressive social media campaign. Specifically, our marketing plan includes:

- Full-page advertisements in the September, October, and November issues of Local Life magazine, with monthly out-of-market readership of 12,038
- Digital programming through Local Life
- Half-page advertisements in three Bluffton and Hilton Head Sun issues in October and November
- Television advertisements and interviews on WHHI
- 2,000 season brochures including the two concerts distributed at the Savannah/Hilton Head International Airport and at all South Carolina interstate welcome centers and rest areas
- 1,000 monthly rack cards including the concerts in October and November liberally distributed in area hotels, vacation

rental offices, restaurants, retail spaces, and at the Savannah/Hilton Head International Airport and at all South Carolina interstate welcome centers and rest areas

- Posters distributed throughout downtown Bluffton
- At least four dedicated e-mail blasts and social media posts for each of the two concerts
- Events listings on the HHSO's and Historic Bluffton Arts and Seafood Festival's websites as well as calendars including the Hilton Head Island Bluffton Chamber of Commerce, Hilton Head Island Town website and Office of Cultural Affairs, and Local Life ("The Scene").

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

Local Life magazine  
Bluffton and Hilton Head Sun  
WHHI-TV

**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 1,200 people, with 15% of them identified as tourists and another 15% as visitors. 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 every year since 2019 (with the exception of 2020, due to the pandemic) to capacity crowds that drew tourists, visitors, and residents during the Thanksgiving holiday weekend. 392 audience members attended the 2025 presentation, with 5.84%

of these identified as tourists and another 10.08% were visitors. [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.

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

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

**Additional Comments:** 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 tourists and 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 five years of Outdoor Pops concerts in October, 2021, through 2025, and our developing collaboration with the Historic Bluffton 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 \$46,818 to pay for the following expenses:

- venue rental of \$950;
- port-o-lets rental of \$734;
- tent, stage, and HVAC rentals of \$25,034;
- sound and lighting equipment rental of \$7,028
- media advertising of \$11,076; and
- print materials and program inserts of \$1,995 (that will also extend the promotion beyond the live performance).

(Please note that rounding of some financial information results in \$1 variances in totals.)

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

FINANCIAL INFORMATION

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

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

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

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Town’s required Line-Item Budget Form:	<a href="#">ATAX Grant Application Line-Item Budget HHSO submitted 2026-03-30.pdf</a>
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Most Recent Fiscal Year Balance Sheet and Profit and Loss Accounting Statement	<a href="#">Audit 2025-06-30 HHSO.pdf</a>
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Financial Guarantee	<a href="#">HHSO Board Minutes 2026-03-26 FINAL.pdf</a>
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*Applicant must provide a copy of official minutes wherein the sponsoring organization approves the project and commits the organization to financial responsibility for carrying it out to the stage of completion.*

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Please attach Budget vs. Actual statements for prior two years events.	<a href="#">Bluffton SUS Budget vs. Actual Report 2026-02-06.pdf</a>
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Please attach Budget vs. Actual statements for prior two years events.	<a href="#">Bluffton Concerts FY25 Report 2025-02-13.pdf</a>
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Have you requested, received, or been awarded ATAX funding from other state or local entities for this project/event?	No
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Have you received or been awarded ATAX funding from other state or local entities for any other project/event? Yes

Awarding Agency Hilton Head Island

Amount \$350,000

Project/Event HHSO Season Operating Grant

Year of Award 2026

Awarding Agency Beaufort County 2% State

Amount \$28,000

Project/Event HHSO Symphony Under The Stars Concert, Fripp Island (April, 2027)

Year of Award 2026

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

**PRIOR RECIPIENT'S REPORT**

If your organization has received ATAX funding from the Town of Bluffton in previous years, you must complete the below information.

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

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

Project/Event Name Hilton Head Symphony Orchestra 2025 Concerts

Year Awarded 2025

Amount Awarded 48781

Was a final report submitted? Yes

What was the total number of tourists? 141

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What was the percentage of tourists? 10.13%

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(Section Break)

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Please attach a copy of your organization's IRS Designation Letter showing your non-profit status . [501C-3 letter 2007-02-08.pdf](#)

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Please upload a copy of your current Town of Bluffton Business License, which is required of all applicants. [Bluffton Business License exp. 2027-04-30.pdf](#)

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Additional Application Documents [Bluffton Concerts FY27 2026-03-30.pdf](#)

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Additional Application Documents *Field not completed.*

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Additional Application Documents *Field not completed.*

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Additional Application Documents *Field not completed.*

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Additional Comments *Field not completed.*

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**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

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

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

**The South Carolina Freedom of Information Act (FOIA) defines a “public body” as any organization or corporation supported in whole or in part by**

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

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

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

---

Signature	Alan Jordan
Signatory's Title or Position	President and CEO

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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,

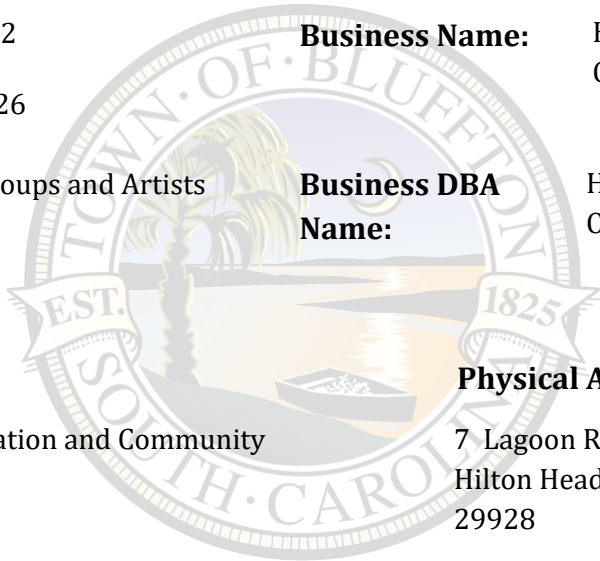


Cindy Westcott  
Manager, Exempt Organizations  
Determinations

# TOWN OF BLUFFTON

## TOWN OF BLUFFTON - Expires:04/30/2027

<b>License No.</b>	26-02-2062	<b>Business Name:</b>	Hilton Head Symphony Orchestra, Inc.
<b>Date Issued:</b>	02/10/2026		
<b>NAICS Title:</b>	Musical Groups and Artists	<b>Business DBA Name:</b>	Hilton Head Symphony Orchestra
<b>Business Type:</b>	Musical Performances, Education and Community Outreach	<b>Physical Address:</b>	7 Lagoon RD Hilton Head Island, SC 29928



**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.

Alan Jordan  
Hilton Head Symphony Orchestra, Inc.  
PO Box 5757  
Hilton Head Island, SC 29938

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

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

**REVENUES**

**Revenues - Cash**

Sponsorships     \$ \_\_\_\_\_ 18,000

Donations     \$ \_\_\_\_\_ 10,000

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

*\* Do **NOT** include anticipated award funds requested in this application*

Other Grants (please name): \_\_\_\_\_ \$ \_\_\_\_\_

Other Grants (please name): \_\_\_\_\_ \$ \_\_\_\_\_

Other Grants (please name): \_\_\_\_\_ \$ \_\_\_\_\_

Vendor Fees     \$ \_\_\_\_\_

Registration Fees     \$ \_\_\_\_\_

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

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

Mercandise Sales     \$ \_\_\_\_\_

Other Sales (please name): Table/Ticket Sales     \$ \_\_\_\_\_ 15,500

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

Other Revenue (please name): Applicant Cash     \$ \_\_\_\_\_ 9,756

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

**Revenues - In-Kind Contributions**

Volunteer Hours     \$ \_\_\_\_\_

Donated Items     \$ \_\_\_\_\_

Donated Services     \$ \_\_\_\_\_

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

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

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

**Total All Revenue Sources:     \$ \_\_\_\_\_ 53,256**

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

**EXPENSES**

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

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

	<b>Amount</b>
<b>Advertising &amp; Promotion of Tourism or Arts and Cultural Events</b>	
Local Newspaper/Digital Advertising	\$ 1,257
Regional Newspaper/Digital Advertising	\$
National Newspaper/Digital Advertising	\$
Local Magazine/Digital Advertising	\$ 5,130
Regional Magazine/Digital Advertising	\$
National Magazine/Digital Advertising	\$
Local Radio Advertising	\$ 800
Regional Radio Advertising	\$
National Radio Advertising	\$
Local Television Advertising	\$
Regional Television Advertising	\$
National Television Advertising	\$
Billboards	\$
Social Media Advertising	\$
E-mail and/or Text Blasts	\$
Postcards/Mailers	\$
Posters/Banners/Signage	\$
Graphic Design of Marketing/Writing or Press Releases	\$ 1,194
Web Hosting for <b>Event</b> (not organization)	\$
Other (please name): Printed program (pro-rated)	\$ 1,615
Other (please name): Rack Cards	\$ 550
Other (please name): Brochure printing (pro-rated)	\$ 825
Other (please name): Design coordination	\$ 1,700
Other (please name):	\$
<b>Total Advertising/Promotion Budget:</b>	<b>\$ 13,071</b>
<b>Facilities for Civic and Cultural Events</b>	
Rentals: Venue(s)	\$ 950
Rentals: Parking Lots	\$
Rentals: Tables, Chairs, Stages, Tents	\$ 25,034
Rental: Sound, Audio Equipment	\$ 7,028
Construction/Renovations/Repairs of Buildings/Facilities	\$
Other (please name):	\$
Other (please name):	\$
Other (please name):	\$
<b>Total Facilities Budget:</b>	<b>\$ 33,012</b>

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

**EXPENSES**

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

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

	<b>Amount</b>
<b>Tourist Transportation</b>	
Company Name: _____	\$ _____
Company Name: _____	\$ _____
<b>Total Transportation Budget:</b>	\$ _____ 0
<b>Public Facilities</b>	
Temporary/Portable Restrooms	\$ _____ 734
Dumpster Rental/Trash Hauling	\$ _____
Construction of Permanent Restrooms	\$ _____
Construction of Parks	\$ _____
Construction of Parking Lots	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
<b>Total Public Facilities Budget:</b>	\$ _____ 734
<b>Municipality and County Services</b>	
Security Provided by Bluffton Police Department	\$ _____
Security <b>NOT</b> Provided by Bluffton Police Department	\$ _____
<b>Total Municipality/County Services Budget:</b>	\$ _____ 0
<b>Operations <i>(only applicable to Visitor Centers and/or Cultural Centers/Museums)</i></b>	
Marketing/Advertising	\$ _____
Utilities <i>(electric, gas, water, phone service, internet, etc.)</i>	\$ _____
Subscriptions <i>(not related to marketing/advertising services)</i>	\$ _____
Supplies <i>(office, janitorial, etc.)</i>	\$ _____
Facility Maintenance <i>(i.e. cleaning, pest control, landscaping, etc.)</i>	\$ _____
Minor Repairs	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
<b>Total Operations Budget:</b>	\$ _____ 0
<b>Total ALL ATAX Eligible Expenses:</b>	\$ _____ 46,817





**HILTON HEAD SYMPHONY ORCHESTRA  
2026 BLUFFTON CONCERTS PROJECT BUDGET  
MARCH 30, 2026 APPLICATION**

	Outdoor Pops-October Budget		Holiday Pops Budget		TOTAL Budget
<b>Revenues</b>					
Table/Ticket Sales	\$3,000	\$3,000		\$12,500	\$15,500
Private Support		\$25,000		\$3,000	\$28,000
Sponsorship and Underwriting	\$15,000		\$3,000		\$18,000
Pro-rated Annual Fund	\$10,000		\$0		\$10,000
Public Support		\$40,987		\$5,830	\$46,818
Other Income		<u>\$7,662</u>		<u>\$2,093</u>	<u>\$9,756</u>
<b>TOTAL REVENUES</b>		<b>\$76,650</b>		<b>\$23,423</b>	<b>\$100,074</b>
<b>Expenses</b>					
Artistic		\$26,433		\$12,524	\$38,957
Guess Artist Expenses	\$1,731		\$1,789		\$3,520
Orchestra Musician Expenses	\$24,701		\$10,735		\$35,437
Production		\$34,793		\$3,229	\$38,023
Production Labor and Security	\$1,262		\$1,348		\$2,609
Venue Rental	\$450 *		\$500 *		\$950 *
Port-O-Lets	\$734 *		\$0		\$734 *
Tent, Stage, and HVAC	\$25,034 *		\$0		\$25,034 *
Sound and Lighting	\$6,313 *		\$715 *		\$7,028 *
Music Library	\$1,000		\$667		\$1,667
Marketing		\$8,456		\$4,615	\$13,071
Media Advertising	\$7,056 *		\$4,020 *		\$11,076 *
Print Materials/Program Inserts	\$1,400 *		\$595 *		\$1,995 *
Development		\$0		\$0	\$0
General & Administrative		<u>\$6,968</u>		<u>\$3,055</u>	<u>\$10,023</u>
<b>TOTAL EXPENSES</b>		<b><u>\$76,650</u></b>		<b><u>\$23,424</u></b>	<b><u>\$100,074</u></b>
<b>NET PROFIT/(LOSS)</b>		<b>\$0</b>		<b>(\$0)</b>	<b>\$0</b>

\* - allowable expense for which Bluffton ATAX Funds are requested

HILTON HEAD SYMPHONY ORCHESTRA, INC.

FINANCIAL STATEMENTS

Years Ended June 30, 2025 and 2024

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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](mailto: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, 2025, 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, 2025, 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.

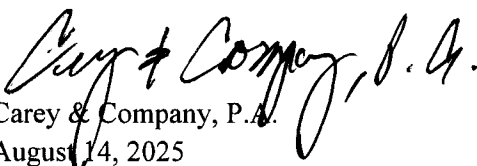
Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.

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, 2024 and we expressed an unmodified audit opinion on those audited financial statements in our report dated August 9, 2024. In our opinion, the summarized comparative information presented herein as of and for the year ended June 30, 2024, is consistent, in all material respects, with the audited financial statements from which it has been derived.

  
Carey & Company, P.A.  
August 14, 2025

HILTON HEAD SYMPHONY ORCHESTRA, INC.  
 STATEMENTS OF FINANCIAL POSITION  
 As of June 30, 2025 and 2024

ASSETS	2025	Summarized Information 2024
<b>Current Assets</b>		
Cash and equivalents	\$ 587,545	\$ 538,708
Pledge and other receivables	21,018	20,573
Prepaid expenses	9,782	20,758
Total Current Assets	618,345	580,039
<b>Property And Equipment</b>		
Furniture, fixtures and equipment	144,385	140,360
Leasehold improvements	841,252	841,252
Accumulated depreciation	(894,747)	(766,193)
Total Property And Equipment	90,890	215,419
<b>Other Assets</b>		
Foundation endowment fund	237,952	229,212
Investments:		
Board designated quasi-endowment fund	209,497	297,039
Donor restricted	734,771	683,511
Total Investments	944,268	980,550
Operating lease right-of-use-asset	519,504	123,077
Intangible assets, net of amortization	1,725	-
Security deposits	17,790	17,790
TOTAL ASSETS	\$ 2,430,474	\$ 2,146,087
<b>LIABILITIES AND NET ASSETS</b>		
<b>Current Liabilities</b>		
Accounts payable	\$ 35,570	\$ 8,268
Line of credit	100,000	100,000
Operating lease liability	175,000	123,077
Payroll taxes payable	12,514	9,987
Deferred ticket revenues	277,485	259,380
Deferred contribution and fundraising revenues	488,144	465,394
Total Current Liabilities	1,088,713	966,106
Operating lease liability, net of current portion	344,504	-
TOTAL LIABILITIES	1,433,217	966,106
<b>Net Assets</b>		
Without donor restrictions	24,534	267,258
With donor restrictions	972,723	912,723
Total Net Assets	997,257	1,179,981
TOTAL LIABILITIES AND NET ASSETS	\$ 2,430,474	\$ 2,146,087

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, 2025 and 2024

	2025			Summarized Information 2024
	Without Donor Restrictions	With Donor Restrictions	Total	
<b>REVENUE AND SUPPORT</b>				
Admissions	\$ 795,924	\$ -	\$ 795,924	\$ 732,419
Contributions and grants	800,899	218,727	1,019,626	980,704
Government support	525,647	-	525,647	426,616
Fundraising and other support	228,656	53,204	281,860	242,734
Investment income	40,398	90,897	131,295	137,260
Restrictions satisfied by payments	302,828	(302,828)	-	-
Total Revenue and Support	2,694,352	60,000	2,754,352	2,519,733
 <b>EXPENSES</b>				
Program	2,028,739	-	2,028,739	1,917,294
Management and general	810,006	-	810,006	721,378
Marketing and development	98,331	-	98,331	105,876
Total Expenses	2,937,076	-	2,937,076	2,744,548
 INCREASE (DECREASE) IN NET ASSETS	(242,724)	60,000	(182,724)	(224,815)
 NET ASSETS AT BEGINNING OF YEAR	267,258	912,723	1,179,981	1,404,796
 NET ASSETS AT END OF YEAR	\$ 24,534	\$ 972,723	\$ 997,257	\$ 1,179,981

See accompanying notes and independent auditor's report.

HILTON HEAD SYMPHONY ORCHESTRA, INC.  
 STATEMENTS OF FUNCTIONAL EXPENSES  
 Years Ended June 30, 2025 and 2024

	2025			Total	Summarized Information 2024
	Program Services	Management and General	Marketing and Development		
Salaries and wages	\$ 637,044	\$ 391,967	\$ 2,292	\$ 1,031,303	\$ 1,085,482
Payroll taxes and related benefits	<u>102,487</u>	<u>31,558</u>	<u>185</u>	<u>134,230</u>	<u>137,009</u>
Total payroll and benefits	739,531	423,525	2,477	1,165,533	1,222,491
Facilities cost	270,387	85,107	-	355,494	295,539
Contract services	371,981	28,943	-	400,925	381,008
Marketing and advertising	61,751	61,751	-	123,502	135,161
Performance production costs	166,962	-	-	166,962	138,816
Travel and lodging	172,921	-	-	172,921	155,919
Prizes, judges and awards	94,997	-	-	94,997	5,305
Fundraising	-	-	93,029	93,029	85,143
Office	8,476	33,456	2,825	44,757	41,219
Bank fees	-	18,719	-	18,719	22,738
Depreciation and amortization	90,051	38,593	-	128,644	129,325
Other	<u>51,682</u>	<u>119,911</u>	<u>-</u>	<u>171,593</u>	<u>131,884</u>
<b>Total expenses</b>	<b><u>\$ 2,028,739</u></b>	<b><u>\$ 810,006</u></b>	<b><u>\$ 98,331</u></b>	<b><u>\$ 2,937,076</u></b>	<b><u>\$ 2,744,548</u></b>

See accompanying notes and independent auditor's report.

HILTON HEAD SYMPHONY ORCHESTRA, INC.  
 STATEMENTS OF CASH FLOWS  
 Years Ended June 30, 2025 and 2024

	2025	Summarized Information 2024
<b>CASH FLOWS FROM OPERATING ACTIVITIES</b>		
Change in net assets	\$ (182,724)	\$ (224,815)
Adjustments to reconcile change in net assets to net cash used by operating activities:		
Unrealized gain on investments	(77,433)	(85,537)
Depreciation and amortization expense	128,644	129,325
Operating lease right-of-use asset	(396,427)	78,840
Increase (decrease) in assets		
Pledge and other receivables	(445)	7,677
Prepaid expenses and security deposits	10,976	(8,957)
Increase (decrease) in liabilities:		
Accounts payable	27,302	(5,124)
Operating lease liability	396,427	(78,840)
Payroll taxes payable	2,527	(696)
Deferred revenues	40,855	92,683
Net Cash Used By Operating Activities	(50,298)	(95,444)
<b>CASH FLOWS FROM INVESTING ACTIVITIES</b>		
Purchase of property and equipment	(4,024)	(2,135)
Purchase of intangible assets	(1,816)	-
Net change in investments	94,819	38,554
Cash released from foundation endowment fund	10,156	10,126
Net Cash Provided By Investing Activities	99,135	46,545
<b>CASH FLOWS FROM FINANCING ACTIVITIES</b>		
Net proceeds from line of credit	-	50,000
Net Cash Provided By Financing Activities	-	50,000
<b>NET INCREASE IN CASH AND CASH EQUIVALENTS</b>	48,837	1,101
<b>CASH AND CASH EQUIVALENTS AT BEGINNING OF YEAR</b>	538,708	537,607
<b>CASH AND CASH EQUIVALENTS AT END OF YEAR</b>	\$ 587,545	\$ 538,708
<b>SUPPLEMENTAL DISCLOSURES - cash payments for:</b>		
Interest	\$ 2,552	\$ 1,033
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, 2025 and 2024, ticket sales of \$259,380 and \$195,539 from previous fiscal year deferred revenue were recognized, respectively.

Leases

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. 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.

Intangible Assets

The Orchestra's intangible assets consist of purchased music libraries. The music libraries include a catalog of original compositions and recordings acquired with full ownership rights, allowing for duplication, distribution, and monetization through various platforms. The music libraries are amortized on a straight-line basis over an estimated useful life of 20 years.

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.

The Financial Accounting Standards Board (FASB) issued ASU 2016-13 Current Expected Credit Losses (CECL), which requires entities to identify losses based on expected losses rather than incurred losses. The Orchestra has determined that all outstanding grants receivable are from a government agency that have a historical relationship with the Orchestra, and therefore do not anticipate any credit losses related to unconditional receivables.

NOTE A - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES - CONTINUED

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.

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 Foundations' investment pool. Fair value for the fund is categorized as Level 1 under the fair value measurement hierarchy and was \$237,952 and \$229,212 at June 30, 2025 and 2024, respectively. The annual withdrawal amount is limited to 4.5% of the average fair market value of the account and totaled \$10,156 and \$10,126 for the years ended June 30, 2025 and 2024, respectively. Net investment income was \$18,896 and \$20,010 for the years ended June 30, 2025 and 2024, 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, 2025 and 2024, the fair market value of this fund was \$200,220 and \$192,865, 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 \$8,545 and \$8,519 for the years ended June 30, 2025 and 2024, respectively.

**NOTE C - LIQUIDITY AND AVAILABILITY OF FINANCIAL ASSETS**

Financial assets as of June 30 are as follows:

	2025	2024
Cash and equivalents	\$ 587,545	\$ 538,708
Foundation endowment fund	237,952	229,212
Investments	944,268	980,550
Total Financial Assets	\$ 1,769,765	\$ 1,748,470

At June 30, 2025 and 2024, financial assets of approximately \$1,532,000 and \$1,515,000, 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 Foundation's 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:

	2025	
	Cost	Fair Value
<b><u>Investments:</u></b>		
Marketable securities	\$ 614,657	\$ 937,929
Cash	6,339	6,339
Total Investments	\$ 620,996	\$ 944,268
	2024	
	Cost	Fair Value
<b><u>Investments:</u></b>		
Marketable securities	\$ 704,782	\$ 906,138
Cash	74,412	74,412
Total Investments	\$ 779,194	\$ 980,550

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, 2025 and 2024, including the Foundation Endowment Fund disclosed in Note B, are summarized as follows:

	2025	2024
Investment earnings	\$ 44,844	\$ 43,442
Investment expenses	(9,878)	(7,845)
Unrealized investment gain	77,433	86,625
Foundation Endowment Fund	18,896	15,038
Total investment return	\$ 131,295	\$ 137,260

**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:

	2025	2024
Beginning balance	\$ 297,039	\$ 332,001
Contributions	150,000	50,000
Withdrawals	(269,843)	(100,000)
Investment earnings	8,722	8,281
Investment expenses	(3,531)	(3,628)
Unrealized investment gain	27,110	10,385
<b>Total Board Designated Investments</b>	<b>\$ 209,497</b>	<b>\$ 297,039</b>

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, 2025 and 2024, the Orchestra has uninsured balances of \$295,914 and \$230,214, 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 \$100,000 line of credit with its bank that is renewed annually on January 1. Borrowings under the line of credit bear interest at 8.5% and are uncollateralized. At June 30, 2025 and 2024, the balance was \$100,000 and \$100,000, respectively. On July 3, 2025, 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:

	2025	2024
Leasehold improvements	\$ 841,252	\$ 841,252
Computer equipment	17,800	17,800
Office furniture and equipment	40,698	37,743
Performance equipment	85,887	84,817
Total property and equipment	985,637	981,612
Accumulated depreciation	(894,747)	(766,193)
Net property and equipment	\$ 90,890	\$ 215,419

Depreciation and amortization expense for the years ended June 30, 2025 and 2024 was \$128,644 and \$129,325, respectively.

NOTE I - REAL PROPERTY LEASE AGREEMENTS

On February 28, 2025, the Orchestra entered into a lease for offices and performance center located in Hilton Head, South Carolina. The lease has a term of forty months that expires on June 30, 2028, 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 \$188,000 and \$188,000 for the years ended June 30, 2025 and 2024, respectively.

Future minimum annual lease payments due over the term of the lease as of June 30, 2025:

2026	\$ 182,000
2027	188,000
2028	192,000
Total undiscounted minimum lease payments	\$ 562,000
Less Discounts to present value	(42,496)
Total operating lease liability	\$ 519,504

As of June 30, 2025, the weighted-average remaining lease term for the operating leases is 3 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, 2025 was 4%.

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 \$62,585 and \$50,955 for the years ended June 30, 2025 and 2024, respectively.

NOTE J - 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, 2025, and the new agreement was executed for the period of July 1, 2025, through June 30, 2028.

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, 2028, was ratified on June 6, 2025.

NOTE K - 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, 2025.

NOTE L - NET ASSETS

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

	2025	2024
International Piano Competition	\$ 32,923	\$ 30,419
Youth programs	701,848	653,092
Permanent endowment fund	237,952	229,212
Total net assets	\$ 972,723	\$ 912,723

NOTE M - RELATED PARTY TRANSACTIONS

The Orchestra used a consultant, of which a Board member's wife is the owner, for Orchestra related administration. The consulting services and performance fee expenses for June 30, 2025 and 2024 were \$13,850 and \$11,550, respectively. Additionally, another board member paid \$6,500 to rent performance space from the Orchestra for the year ending June 30, 2025.

NOTE N - SUBSEQUENT EVENTS

The Orchestra has evaluated subsequent events through August 14, 2025, 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**  
**Board of Directors**  
**Minutes of Board Meeting, Thursday, March 26, 2026**

The meeting was called to order by Chair Princing at 9:30 am.

In attendance were Directors Wayne Efron, Carol Hack, Art Handman, Gloria Holmes, Mona Huff, Bret Jacobowitz, Blaine Lotz, Chad Martin, David McCoy, Sarah Meyer, Peggi Moon, Mary Princing, Charles Sampson, Regina Silletti, Ed Simmons, and Blake White; ex officio members Nancy Millette and Mario Incorvaia; President and CEO Alan Jordan, Finance Manger Christie Brooks, and Secretary pro tem Julie Williams. Steve Shaiman attended virtually.

### **Chair's Remarks**

Princing welcomed Gloria Holmes who was able to attend this meeting in person. Lately, she has been a dedicated "Zoomer." She also thanked the League for their "new concept" fashion show the previous evening which appears to have been a great success, and Director Chad Martin for the entertaining music.

### **Consent Agenda**

The consent agenda was composed of two items: the minutes of the February 26 meeting and the President and CEO's report. **It was moved by Lotz and seconded by Hack that the consent agenda be approved as submitted; motion passed.**

### **Board Development Report**

Chair Hack told the group that the committee is in the "early consideration" phase for several candidates to serve a first term during the 2026-2027 season. She named five individuals. Protocol dictates that names are not included in the minutes to maintain confidentiality until a final slate is assembled. Four Directors are retiring so the organization needs to replace at least three to maintain its minimum of 18. Hack asked anyone who knows one or more of these people to contact her or Jordan to transmit relevant information. The committee will prepare a slate for voting at the May Board meeting.

### **September Financial Report**

Through February 28 (eight months of FY 26), the P&L shows a net profit of \$70, 855. Subsequent analysis forecasts a net loss for this year. Everything possible to avoid another year in the red is under consideration, as the HHSO finalizes its budget for FY 27. **It was moved by Millette and seconded by Lotz that the financial report be approved as submitted; motion passed.**

### **Strategic Planning Committee Report**

Simmons and Jordan teamed up to present the Strategic Planning Committee's work on a 2-year plan, the period for which will commence July 1, 2026. Following is a brief recap of the process. The HHSO retained the University of South Carolina Beaufort's Center for Strategic Planning via a grant from the Community Foundation of the Lowcountry and a Board member's donation. The group's disciplined process is data-driven, beginning with a survey of four constituencies: Board members (100% of whom replied), staff, donors/patrons and community partners. Preliminary results were shared and a group of 10 people consisting of representatives from the four constituencies took part in a facilitated one-day workshop to discuss and drill down on the results. Three goals, which have been recommended by the Strategic Planning Committee, were identified: 1) Increase HHSO's Orchestra Series attendance by 20%, 2) Establish a sustainable operating model that will consistently produce balanced budgets and operating reserves, 3) Determine the products, venues

and resources required to meet what people want in order to grow our audience. Jordan underl things central to success: Raising more money and gaining new audiences. The presentation contains additional detail and will be sent to members in the next few days. **It was moved by Jacobowitz and seconded by Hack that Directors review the presentation in preparation to discuss it and vote to adopt a plan for FY 27/28 at the April Board meeting; motion passed.**

**Hilton Head International Piano Competition Report**

Shaiman briefed the group on this event which concluded Saturday, March 21 with five finalists playing a movement of a concerto with the HHSO, John Morris Russell conducting. 2026 is the 7th Young Artist competition and it was by all measures a great success. The field of 20 (selected in the fall by a panel of jurors from 166 applicants) was likely the most talented group we have hosted. They delivered exceedingly high levels of performance throughout, making the competition jury’s job very challenging. The event ran smoothly, as evidenced by feedback from the jury, competitors, and multiple host families who literally care for competitors from the time they land at the airport to when they depart for home. Steve was highly complimentary of the HHIPC Committee (approximately 20 individuals) who work for 8 months, beginning in September. We were successful in getting competitors to be Ambassadors, performing live for at least 500 seniors and 2,000 students in public and private schools on the island and in Bluffton. All rounds of the competition were livestreamed. Our partner in China, Amadeus.tv reported 185,000 viewers. Results from other countries will be tabulated. Two observations from Huff (HHIPC’S previous Director): Given that the HHIPC is an important HHSO event, there should be greater participation from the Board, especially for the early rounds, and the reception, for which the HHSO Board is responsible, must be improved (not enough goodies).

**New Business**

Orchestra Series

Incorvaia presented the 2026-2027 Orchestra Series concerts, which should remain confidential until the subscription brochure is mailed at the end of the month. He shared a little about the process, which is led by Music Director JMR, CEO Jordan and EVP Incorporvaia assisted by numerous committees, notably Artistic Advisory. Both the opening concert and the closing concert will have only one performance—a Sunday matinee. The others will have both Sunday and Monday performances. Discussion on how this will affect subscription seating is underway.

Bluffton ATAX

Our proposal to procure Bluffton ATAX funds for next season (\$46,818) will be submitted March 30, 2026. **It was moved by Sampson and seconded by Handman that the HHSO request these funds; motion passed.**

Young Persons Concerts

The YPC will take place on Hilton Head Tuesday, April 28 and in Beaufort—for the first time—on Wednesday, April 29. Volunteers will be needed in Beaufort. Contact Jordan if you can assist.

**Annual Meeting May 28**

The start time for this meeting will 10:30 am, followed by lunch.

**Adjournment**

**The next meeting is Thursday, April 23 at 9:30 am at Soundwaves (socializing at 9:15).**

**It was moved by Huff, and seconded by Silletti, that the meeting be adjourned; motion passed at 10:58 am.**

Respectfully submitted,  
Julie Williams, Secretary pro tem



**HILTON HEAD SYMPHONY ORCHESTRA  
2025 BLUFFTON CONCERTS PROJECT BUDGET  
FEBRUARY 6, 2026, REPORT**

	Outdoor Pops-October		Holiday Pops		TOTAL	
	Budget	Actual	Budget	Actual	Budget	Actual
<b>Revenues</b>						
Table/Ticket Sales	\$3,000	\$1,500.00	\$13,675	\$12,567.00	\$16,675	\$14,067.00
Private Support	\$25,000	\$31,605.30	\$3,000	\$15,094.00	\$28,000	\$46,699.30
Sponsorship and Underwriting	\$15,000	\$5,000.00	\$3,000	\$0.00	\$18,000	\$5,000.00
Pro-rated Annual Fund	\$10,000	\$26,605.30	\$0	\$15,094.00	\$10,000	\$41,699.30
Public Support	\$40,760	\$36,329.22	\$8,021	\$5,707.34	\$48,781	\$42,036.56
Other Income	\$4,684	\$0.00	\$286	\$3,059.51	\$4,970	\$3,059.51
<b>TOTAL REVENUES</b>	<b>\$73,444</b>	<b>\$69,434.52</b>	<b>\$24,982</b>	<b>\$36,427.85</b>	<b>\$98,426</b>	<b>\$105,862.37</b>
<b>Expenses</b>						
Artistic	\$20,843	\$22,586.13	\$11,689	\$24,477.72	\$32,532	\$47,063.85
Guess Artist Expenses	\$1,481	\$1,168.48	\$1,206	\$1,801.00	\$2,687	\$2,969.48
Orchestra Musician Expenses	\$19,362	\$21,417.65	\$10,483	\$22,676.72	\$29,845	\$44,094.37
Production	\$31,807	\$30,602.11	\$3,229	\$2,641.33	\$35,036	\$33,243.44
Production Labor and Security	\$1,262	\$712.50	\$1,348	\$808.33	\$2,609	\$1,520.83
Venue Rental	\$450 *	\$0.00 *	\$500 *	\$500.00 *	\$950 *	\$500.00 *
Port-O-Lets	\$1,422 *	\$667.45 *	\$0	\$0.00	\$1,422 *	\$667.45 *
Tent, Stage, and HVAC	\$23,079 *	\$22,732.20 *	\$0	\$0.00	\$23,079 *	\$22,732.20 *
Sound and Lighting	\$4,595 *	\$5,739.53 *	\$715 *	\$650.00 *	\$5,310 *	\$6,389.53 *
Music Library	\$1,000	\$750.43	\$667	\$683.00	\$1,667	\$1,433.43
Marketing	\$11,215	\$7,190.04	\$6,806	\$4,557.34	\$18,021	\$11,747.38
Media Advertising	\$9,815 *	\$5,934.15 *	\$6,211 *	\$4,065.03 *	\$16,026 *	\$9,999.17 *
Print Materials/Program Inserts	\$1,400 *	\$1,255.90 *	\$595 *	\$492.31 *	\$1,995 *	\$1,748.21 *
Development	\$0	\$0.00	\$0	\$0.00	\$0	\$0.00
General & Administrative	\$9,580	\$9,056.74	\$3,259	\$4,751.46	\$12,838	\$13,807.70
<b>TOTAL EXPENSES</b>	<b>\$73,445</b>	<b>\$69,435.02</b>	<b>\$24,983</b>	<b>\$36,427.85</b>	<b>\$98,427</b>	<b>\$105,862.37</b>
<b>NET PROFIT/(LOSS)</b>	<b>(\$0)</b>	<b>\$0.00</b>	<b>(\$0)</b>	<b>(\$0.00)</b>	<b>\$0</b>	<b>\$0.00</b>



**HILTON HEAD SYMPHONY ORCHESTRA  
2024 BLUFFTON CONCERTS PROJECT BUDGET VS. ACTUAL  
FEBRUARY 13, 2025 REPORT**

	Outdoor Pops-October		Holiday Pops		TOTAL	
	Budget	Actual	Budget	Actual	Budget	Actual
<b>Revenues</b>						
Table/Ticket Sales	\$1,500	\$0	\$12,000	\$13,679	\$13,500	\$13,679
Private Support	\$25,000	\$20,500	\$5,500	\$2,500	\$30,500	\$23,000
Sponsorship and Underwriting	\$15,000	\$10,500	\$3,000	\$0	\$18,000	\$10,500
Pro-rated Annual Fund	\$10,000	\$10,000	\$2,500	\$2,500	\$12,500	\$12,500
Public Support	\$35,420	\$32,204	\$8,212	\$7,491	\$43,632	\$39,694
Other Income	\$1,500	\$4,000	\$0	\$0	\$1,500	\$4,000
<b>TOTAL REVENUES</b>	<b>\$63,420</b>	<b>\$56,704</b>	<b>\$25,712</b>	<b>\$23,669</b>	<b>\$89,132</b>	<b>\$80,373</b>
<b>Expenses</b>						
Artistic	\$23,716	\$20,771	\$10,036	\$11,692	\$33,752	\$32,463
Guess Artist Expenses	\$2,250	\$1,973	\$1,628	\$1,514	\$3,878	\$3,487
Orchestra Musician Expenses	\$21,466	\$18,798	\$8,408	\$10,178	\$29,874	\$28,976
Production	\$28,342	\$26,280	\$2,150	\$2,743	\$30,492	\$29,023
Production Labor and Security		\$743	\$500	\$1,225	\$500	\$1,968
Venue Rental	\$0 *	\$450 *	\$500 *	\$500 *	\$500 *	\$950 *
Port-O-Lets	\$1,292 *	\$1,292 *	\$0	\$0	\$1,292 *	\$1,292 *
Tent, Stage, and HVAC	\$21,439 *	\$18,052 *	\$0	\$0	\$21,439 *	\$18,052 *
Sound and Lighting	\$4,611 *	\$4,177 *	\$400 *	\$650 *	\$5,011 *	\$4,827 *
Music Library	\$1,000	\$1,566	\$750	\$368	\$1,750	\$1,934
Marketing	\$9,111	\$8,233	\$7,312	\$6,341	\$16,424	\$14,573
Media Advertising	\$7,503 *	\$7,746 *	\$6,669 *	\$5,766 *	\$14,172 *	\$13,512 *
Print Materials/Program Inserts	\$1,608 *	\$487 *	\$643 *	\$575 *	\$2,251 *	\$1,062 *
Development	\$0	\$0	\$0	\$0	\$0	\$0
General & Administrative	\$6,117	\$5,528	\$2,925	\$3,116	\$9,042	\$8,645
<b>TOTAL EXPENSES</b>	<b>\$67,286</b>	<b>\$60,812</b>	<b>\$22,424</b>	<b>\$23,891</b>	<b>\$89,710</b>	<b>\$84,704</b>
<b>NET PROFIT/(LOSS)</b>	<b>(\$3,866)</b>	<b>(\$4,108)</b>	<b>\$3,289</b>	<b>(\$222)</b>	<b>(\$576)</b>	<b>(\$4,330)</b>

\* - allowable expense for which Bluffton ATAX Funds are requested

TOWN OF BLUFFTON ATAX GRANT APPLICATION SCORING SHEET

Entity: **Hilton Head Symphony Orchestra**

Project: **2026 Bluffton Concerts**

Project Type: **Event/Festival**

Scoring Category	Points Possible	Points Awarded
<b>ADVERTISING</b>	<b>15</b>	
<b>Part 1: Five (5) points possible. Based on how much of the requested funds go toward advertising.</b>		
0% of funds go toward advertising	0 points	
1% - 20% of funds go toward advertising	1 point	
21% - 40% of funds go toward advertising	2 points	
41% - 60% of funds go toward advertising	3 points	
61% - 80% of funds go toward advertising	4 points	
81% - 100% of funds go toward advertising	5 points	
<b>Part 2: Ten (10) points possible. Based on where the advertising is placed.</b>		
None of the funds go toward advertising	0 points	
Local newspapers/periodicals and electronic advertising (ex. Island Packet, The Bluffton Sun)	2 points	
Local guides/periodicals specifically geared toward tourists with a shelf life of more than 30 days	4 points	
Larger regional publications and electronic marketing within 100 miles (ex. Charleston or Savannah news outlets)	6 points	
Newspapers/periodicals/electronic marketing to large, metropolitan areas outside of 100 miles away (ex. Atlanta, Charlotte, Washington, D.C., Chicago)	8 points	
Nationally distributed newspapers/periodicals/electronic marketing (ex. USA Today, NY Times, Southern Living Magazine)	10 points	
<b>TOURIST FACILITIES</b>	<b>15</b>	
Higher point value given based on anticipated ratio of tourists to locals		
<b>FESTIVAL/EVENT</b>	<b>5</b>	
Higher point value given to requests for festivals or events		
Length of event/festival should be considered. Is it an all-day event versus a two-hour event? Multi-day event?		
<b>BLUFFTON EVENT</b>	<b>5</b>	
Higher point value given to events held within the town limits of Bluffton and/or spanning multiple locations		
<b>TOURISM DRAW</b>	<b>5</b>	
0% of attendees are tourists based on historical or projected information	0 points	
1% - 20% of attendees are tourists based on historical or projected info	1 point	
21% - 40% of attendees are tourists based on historical or projected info	2 points	
41% - 60% of attendees are tourists based on historical or projected info	3 points	
61% - 80% of attendees are tourists based on historical or projected info	4 points	
81% - 100% of attendees are tourists based on historical or projected info	5 points	
<b>BENEFIT TO TOURISM (LOCAL ECONOMY)</b>	<b>5</b>	
Higher point value given to events that encourage overnight stays and/or have local business participation		
<b>SELF SUFFICIENCY</b>	<b>5</b>	
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	
<b>MISCELLANEOUS</b>	<b>10</b>	
Only use if applicant does not qualify as a festival/event		
<b>Group Average Point Total (out of a possible 40 points)</b>		<b>0</b>
<b>Group Average Percentage</b>		

**ACCOMMODATIONS TAX ADVISORY COMMITTEE  
STAFF REPORT  
Department of Finance & Administration**



MEETING DATE: May 19, 2026  
 SUBJECT: Beaufort Water Search and Rescue: Replacement of Boat  
 PROJECT MANAGER: Jeremy Bullock, Grants Administrator

Summarized below is the application from the Beaufort Water Search and Rescue for Accommodations Tax grant dollars in support of the purchase of a replacement boat in order to conduct continued support of rescue and recovery in the boating community.

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

**Total Budget: \$43,750**  
**Requested Amount: \$21,875**  
**Percentage of Request^: 50%**

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

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Budget per Category (based on Budget Form), corrected as needed	
Advertising & Promotion of Tourism or Arts and Cultural Events	\$-	
Facilities for Civic and Cultural Events	43,750	
Public Facilities	-	*
Municipality and County Services	-	*
Tourist Transportation	-	*
Other/Ineligible Project Expenses	-	
<b>Total</b>	<b>\$43,750</b>	

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

**Budgeted Expenses Summary:**

Facilities for Civic and Cultural Events:

Total Budget: \$43,750

- Purchase of replacement boat, upfitting and delivery

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

Amount Requested	Tourist Facilities (15)	Tourism Draw % (5)	Benefit to Tourism (5)	Self-Sufficiency % (5)	Miscellaneous (10)	Total of 40 possible	Comments
\$21,875	2	0	2	1	1	6	

Tourist Facilities: Funds would allow for the purchase of a boat to replace existing boat dedicated to the Bluffton area that would be used to conduct search and recovery in Bluffton waterways under the direction of Beaufort County Emergency Management in conjunction with federal, state and local response.

Tourism Draw %: The boat would be used to support recreational boating, existing waterway tours and special events.

Benefit to Tourism: BWSAR is an all-volunteer water search and rescue organization whose primary mission is to support and assist local, state and federal emergency response in times of need. BWSAR is on duty at local events/celebrations and responds to water safety incidents throughout the year.

Self-Sufficiency %: Requesting 50% of the budget for a full replacement; community donations, prior grant carryover and BWSAR reserves will be leveraged as matching funds.

Previous Funding Amounts							
Fiscal Year	Requested Amount	% of Budget	Advisory Committee Recommendation	Town Council Approved	Expended	Lapsed	Comments
N/A							

**Accommodations Tax Committee Recommendations and Comments:**

The replacement/purchase of this boat does not fit the criteria of accommodations tax funds.

The Committee recommends funding \$ 0 for the purchase of a replacement boat and equipment.

# ACCOMMODATIONS TAX ADVISORY COMMITTEE STAFF REPORT

Department of Finance & Administration



MEETING DATE: May 19, 2026  
 SUBJECT: Beaufort Water Search and Rescue: Replacement of Boat  
 PROJECT MANAGER: Jeremy Bullock, Grants Administrator

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**Percentage of Request^:** 50%

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

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Budget per Category (based on Budget Form), corrected as needed	
Advertising & Promotion of Tourism or Arts and Cultural Events	\$-	
Facilities for Civic and Cultural Events	43,750	
Public Facilities	-	*
Municipality and County Services	-	*
Tourist Transportation	-	*
Other/Ineligible Project Expenses	-	
<b>Total</b>	<b>\$43,750</b>	

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

### Budgeted Expenses Summary:

#### Facilities for Civic and Cultural Events:

Total Budget: \$43,750

- Purchase of replacement boat, upfitting and delivery

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

Amount Requested	Tourist Facilities (15)	Tourism Draw % (5)	Benefit to Tourism (5)	Self-Sufficiency % (5)	Miscellaneous (10)	Total of 40 possible	Comments
\$21,875							

Tourist Facilities: Funds would allow for the purchase of a boat to replace existing boat dedicated to the Bluffton area that would be used to conduct search and recovery in Bluffton waterways under the direction of Beaufort County Emergency Management in conjunction with federal, state and local response.

Tourism Draw %: The boat would be used to support recreational boating, existing waterway tours and special events.

Benefit to Tourism: BWSAR is an all-volunteer water search and rescue organization whose primary mission is to support and assist local, state and federal emergency response in times of need. BWSAR is on duty at local events/celebrations and responds to water safety incidents throughout the year.

Self-Sufficiency %: Requesting 50% of the budget for a full replacement; community donations, prior grant carryover and BWSAR reserves will be leveraged as matching funds.

Previous Funding Amounts							
Fiscal Year	Requested Amount	% of Budget	Advisory Committee Recommendation	Town Council Approved	Expended	Lapsed	Comments
N/A							

Accommodations Tax Committee Recommendations and Comments:

---

The Committee recommends funding \$ \_\_\_\_\_ for \_\_\_\_\_.

**Bullock, Jeremy**

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**From:** noreply@civicplus.com  
**Sent:** Monday, March 30, 2026 4:02 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

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## TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

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

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

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(Section Break)

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Application Date 3/30/2026

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Project Name Water Rescue Services & Water Related Event Patrols

---

Project/Event Location Bluffton district

---

Is this a new project or event? Yes

---

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

---

Project/Event Start Date: 1/1/2026

---

Project/Event End Date	12/31/2026
Multi-Year Project/Event?	No
Total Project Costs	21,875
Total ATAX Funds Requested	21,875
Percent of Total Budget	50
Date the funds are needed:	7/1/2026
Full Legal Organization Name	Beaufort Water Search And Rescue
Address	817 Paris Ave.
Street Address Line 2	<i>Field not completed.</i>
City	Port Royal
State	SC
Zip Code	29935
Applicant must be designated as a non-profit entity to receive ATAX funds. Is your entity a non-profit organization?	Yes

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

Organization Primary Point of Contact

First Name	Patrick
Last Name	Canning
Title	Board Member
Phone Number	484-764-5570
E-mail Address	<a href="mailto:patrick.canning@bwsar.org">patrick.canning@bwsar.org</a>

(Section Break)

Organization Secondary Point of Contact

First Name	Clay
Last Name	Emminger
Title	Chief
Phone Number	843-525-1969
E-mail Address	<a href="mailto:clay.emminger@bwsar.org">clay.emminger@bwsar.org</a>

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

**Project Description:** The requested \$21,875 (50% of the \$43,750 total project cost) will fund the acquisition of a replacement 23-foot center console boat (hull, motor, and trailer) for Beaufort Water Search and Rescue (BWSAR), our all-volunteer nonprofit organization. This vessel will maintain reliable, dedicated on-water search, rescue, recovery, and safety patrol capabilities focused on Bluffton’s key tourism waterways, including the May River, Calibogue Sound, and associated marshes and boat ramps.

The current vessel has reached the end of its service life due to age and wear. Replacing it ensures uninterrupted 24/7 emergency response and safety support for recreational boaters, kayakers, and visitors enjoying Bluffton’s waterways. This directly supports tourism by providing essential safety infrastructure that enhances visitor confidence and enables safe participation in water-based recreation and local events. This request complies with SC Code §6-4-10(4)(b) as a tourism-related expenditure under:

Construction, maintenance, and operation of facilities for civic and cultural activities (the boat serves as mobile safety support for events and public access to waterways). Additional municipal services that promote tourism and enlarge its economic benefits by enhancing the Town’s ability to attract and provide for tourists through improved waterway safety and emergency preparedness.

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

N/A

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

N/A

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

N/A

**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:

Bluffton attracts thousands of tourists annually who engage in boating, kayaking, fishing, paddle sports, and waterfront activities along the May River and Calibogue Sound. Reliable water rescue and safety patrols directly enhance the visitor experience by reducing risks during peak recreational periods and supporting safe access to Bluffton’s natural and cultural amenities.

By maintaining this critical asset, BWSAR helps sustain Bluffton’s appeal as a safe, family-friendly destination for water-based tourism. This encourages longer stays, repeat visitation, and positive word-of-mouth, which in turn supports overnight accommodations, local dining, and retail spending within town limits. The boat also enables safety coverage for events and public use of Bluffton-area waterways, contributing to the overall economic benefits of tourism in the Town.

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

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

Additional Comments:

BWSAR is a 100% all-volunteer organization founded in 1975 with over 50 years of experience providing professional on-water search, rescue, and recovery services. We operate with no paid staff and maintain strict fiscal accountability through dedicated grant accounts, transparent budgeting, and timely

reporting.

In the past 12 months, our volunteers contributed over 2,200 man-hours across approximately 97 missions, (nearly 40% of this is attributable to Bluffton specifically), many involving recreational boaters and visitors in the Lowcountry. We work under the direction of Beaufort County Emergency Management and maintain strong operational partnerships with the U.S. Coast Guard, SC DNR Marine Patrol, Bluffton Town Police, and local fire/rescue agencies.

For this project, we will provide a 50% match (\$21,875) through BWSAR reserves, community donations, and prior grant carryover. All expenditures will occur in compliance with Town of Bluffton ATAX guidelines, with primary benefit focused on Bluffton town limits and surrounding waterways used by Town visitors. We have successfully managed previous ATAX-funded equipment and patrol support with full documentation and reimbursement compliance.

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

**FINANCIAL INFORMATION**

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

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

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

Town’s required Line-Item Budget Form: [Detailed Project Budget.pdf](#)

Most Recent Fiscal Year Balance Sheet and Profit and Loss Accounting Statement [Profit and Loss worksheet.pdf](#)

Financial Guarantee [2026.3.3 Meeting Minutes \(Board\).pdf](#)

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

(Section Break)

Have you requested, received, or been awarded ATAX funding from other state or local entities for this project/event?

Yes

If yes, please list all sources and amounts:  
Awarding Agency

Beaufort County ATAX (FY2026)

Amount

21,875

Awarding Agency

*Field not completed.*

Amount

*Field not completed.*

Have you received or been awarded ATAX funding from other state or local entities for any other project/event?

Yes

Awarding Agency

Beaufort City ATAX

Amount

17,500

Project/Event

Bluffton district

Year of Award

2026

Awarding Agency

Beaufort City ATAX

Amount

20,000

Project/Event

Beaufort district

Year of Award

2025

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

**PRIOR RECIPIENT'S REPORT**

If your organization has received ATAX funding from the Town of Bluffton in previous years, you must complete the below information.

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

---

Has your organization previously received ATAX funds from the Town of Bluffton? No

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(Section Break)

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Please attach a copy of your organization's IRS Designation Letter showing your non-profit status . [IRS Letter 947.pdf](#)

---

Please upload a copy of your current Town of Bluffton Business License, which is required of all applicants. [exemption.pdf](#)

---

Additional Application Documents *Field not completed.*

---

Additional Application Documents *Field not completed.*

---

Additional Application Documents *Field not completed.*

---

Additional Application Documents *Field not completed.*

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**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

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

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

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

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

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

---

Signature	Patrick Canning
-----------	-----------------

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Signatory's Title or Position	Board Member
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Email not displaying correctly? [View it in your browser.](#)



INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Section X. Item #6.

Date: **NOV 27 2017**

BEAUFORT WATER SEARCH RESCUE  
817 PARIS AVENUE  
PORT ROYAL, SC 29935-0000

Employer Identification Number:  
57-1126299  
DLN:  
26053706001137  
Contact Person:  
CUSTOMER SERVICE ID# 31954  
Contact Telephone Number:  
(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:  
May 15, 2017  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

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.

Based on the information you submitted in your application, we approved your request for reinstatement under Revenue Procedure 2014-11. Your effective date of exemption, as listed at the top of this letter, is retroactive to your date of revocation.

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](http://www.irs.gov/charities). Enter "4221-PC" in the search bar

Letter 947

Beaufort Water Search And Rescue responds at the direction of the Beaufort County Emergency Management office in the event of a water emergency.

We are not a business nor non-profit that charges for services or collects sales taxes, therefore we do not believe we have the need for a business license.

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

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

**REVENUES**

**Revenues - Cash**

	Sponsorships	\$	
	Donations	\$	3,000
	ATAX Grants/Funding from Other Entities*	\$	7,000
	<i>* Do <b>NOT</b> include anticipated award funds requested in this application</i>		
Other Grants (please name):		\$	
Other Grants (please name):		\$	
Other Grants (please name):		\$	
	Vendor Fees	\$	
	Registration Fees	\$	
Other Fees (please name):		\$	
Other Fees (please name):		\$	
	Mercandise Sales	\$	
Other Sales (please name):		\$	
Other Sales (please name):		\$	
Other Revenue (please name): reserves		\$	11,875
Other Revenue (please name):		\$	
 <b>Revenues - In-Kind Contributions</b>			
	Volunteer Hours	\$	
	Donated Items	\$	
	Donated Services	\$	
Other (please name):		\$	
Other (please name):		\$	
Other (please name):		\$	
<b>Total All Revenue Sources:</b>		<b>\$</b>	<b>21,875</b>

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

**EXPENSES**

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

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

	<b>Amount</b>
<b>Advertising &amp; Promotion of Tourism or Arts and Cultural Events</b>	
Local Newspaper/Digital Advertising	\$ _____
Regional Newspaper/Digital Advertising	\$ _____
National Newspaper/Digital Advertising	\$ _____
Local Magazine/Digital Advertising	\$ _____
Regional Magazine/Digital Advertising	\$ _____
National Magazine/Digital Advertising	\$ _____
Local Radio Advertising	\$ _____
Regional Radio Advertising	\$ _____
National Radio Advertising	\$ _____
Local Television Advertising	\$ _____
Regional Television Advertising	\$ _____
National Television Advertising	\$ _____
Billboards	\$ _____
Social Media Advertising	\$ _____
E-mail and/or Text Blasts	\$ _____
Postcards/Mailers	\$ _____
Posters/Banners/Signage	\$ _____
Graphic Design of Marketing/Writing or Press Releases	\$ _____
Web Hosting for <b>Event</b> (not organization)	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
<b>Total Advertising/Promotion Budget:</b>	\$ _____ 0
<b>Facilities for Civic and Cultural Events</b>	
Rentals: Venue(s)	\$ _____
Rentals: Parking Lots	\$ _____
Rentals: Tables, Chairs, Stages, Tents	\$ _____
Rental: Sound, Audio Equipment	\$ _____
Construction/Renovations/Repairs of Buildings/Facilities	\$ _____
Other (please name): Purchase R8 (replacement) Bluffton	\$ _____ 43,750
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
<b>Total Facilities Budget:</b>	\$ _____ 43,750

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

**EXPENSES**

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

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

	<b>Amount</b>
<b>Tourist Transportation</b>	
Company Name: _____	\$ _____
Company Name: _____	\$ _____
<b>Total Transportation Budget:</b>	\$ _____ 0
<b>Public Facilities</b>	
Temporary/Portable Restrooms	\$ _____
Dumpster Rental/Trash Hauling	\$ _____
Construction of Permanent Restrooms	\$ _____
Construction of Parks	\$ _____
Construction of Parking Lots	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
<b>Total Public Facilities Budget:</b>	\$ _____ 0
<b>Municipality and County Services</b>	
Security Provided by Bluffton Police Department	\$ _____
Security <b>NOT</b> Provided by Bluffton Police Department	\$ _____
<b>Total Municipality/County Services Budget:</b>	\$ _____ 0
<b>Operations <i>(only applicable to Visitor Centers and/or Cultural Centers/Museums)</i></b>	
Marketing/Advertising	\$ _____
Utilities <i>(electric, gas, water, phone service, internet, etc.)</i>	\$ _____
Subscriptions <i>(not related to marketing/advertising services)</i>	\$ _____
Supplies <i>(office, janitorial, etc.)</i>	\$ _____
Facility Maintenance <i>(i.e. cleaning, pest control, landscaping, etc.)</i>	\$ _____
Minor Repairs	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
Other (please name): _____	\$ _____
<b>Total Operations Budget:</b>	\$ _____ 0
<b>Total ALL ATAX Eligible Expenses:</b>	\$ _____ 43,750



Category / Line Item	Description	Amount (\$)	% of Total	Funding Source	Notes / Justification
<b>Boat Acquisition (Hull + Motor + Trailer)</b>	Purchase of 23 ft Carolina Skiff LS (or equivalent DLV-style) center console with outboard motor (min 115 HP, up to 200 HP recommended for load/performance) and tandem trailer. Includes essential factory/standard features (e.g., console, seating, bilge, navigation lights).	40,000	91.43%	- Grant: \$20,000 - Matching: \$20,000	Core item; versatile hull for Bluffton district ops (shallow 7" draft, stable tri-hybrid design for sounds/rivers/events). Vendor quotes attached (target 115–175 HP for balance of power/economy/fuel). Directly enables tourism event patrols (Water Festival 10 days, Blue Angels river closures, 4th July fireworks, kayak races, etc.) and visitor safety on waterways.
<b>Outfitting / Rescue- Specific Upgrades</b>	Essential add-ons for SAR: navigation/GPS/chartplotter, VHF radio upgrade, rescue lighting (spotlight/strobe), tow post, first-aid/rescue, enhancements.	2,500	5.71%	- Grant: \$1,250 - Matching: \$1,250	Required for operational readiness in search/rescue/recovery; ties to emergency preparedness for tourists/visitors.
<b>Delivery, Registration , Taxes</b>	Dealer delivery/prep, SC registration/title, sales tax	1,250	2.86%	- Grant: \$625 - Matching: \$625	One-time costs; ensures immediate deployment post-purchase.
<b>Total Project Cost</b>		<b>43,750</b>	<b>100%</b>		

Category / Line Item	Description	Amount (\$)	% of Total	Funding Source	Notes / Justification
<b>Grant Request (Matching Funds)</b>	50% of total	<b>21,875</b>	<b>50%</b>	Bluffton City ATAX Grant	Requested amount; complies with tourism- related categories (e.g., Facilities for Civic/Cultural Events maintenance, emergency services attendant to tourism waterways/access).
<b>Matching / Other Sources</b>	Breakdown: • BWSAR reserves: \$11,875 • Community/individual donations: \$3,000 • Other sources (prior grants carryover): \$7,000	<b>21,875</b>	<b>50%</b>	BWSAR funds, donations, events	Proof (bank statements, donation logs, board commitment) attached; all-volunteer structure maximizes impact (no salaries).

**Statement Of Accounts (2025 fiscal year)**

July 1, 2024 thru June 30. 2025

**Revenues**

Individual Donations	\$3,000.00
fiscal 2024 carry forward	\$22,937.60
Beaufort County Grant	\$40,000.00
Beaufort City Grant	\$20,000.00
County Stipend (\$2,500 quarterly)	\$10,000.00
Asset Sales	\$14,200.00
Fundraising	\$40,562.00
<b>Total</b>	<b>\$150,699.60</b>

**Expenses**

General Administrative Expense	\$7,691.43
Maintenance	\$11,871.00
Equipment Purchases	\$14,333.30
Fuel Expense	\$1,364.16
Insurance	\$6,074.21
Utilities	\$8,607.86
Purchase of R4	\$35,670.00
Purchase of Rigid Inflatable	\$15,516.00
<b>Total</b>	<b>\$101,127.96</b>

Net \$49,571.64

**Statement Of Accounts (2026 fiscal year)**

July 1, 2025 thru June 30. 2026

**Revenues**

Individual Donations	\$3,000.00
fiscal 2024 carry forward	\$49,571.64
County Stipend	\$50,000.00
Asset Sales (anticipated)	\$22,000.00
Fundraising	\$26,000.00
<b>Total</b>	<b>\$150,571.64</b>

**Expenses**

General Administrative Expense	\$2,500.00
Maintenance	\$7,250.00
Equipment Purchases	\$12,000.00
taxes	\$4,250.00
Fuel Expense	\$3,000.00
Insurance	\$6,250.00
Utilities	\$6,650.00
Fundraising expense	\$5,000.00
Marketing/Promotional	\$15,000.00
(BWSAR funds)	\$7,500.00
Bluffton City (ATAX funds)	\$7,500.00
Equipment Purchase R9 (replacement) Bluffton	\$37,010.00
(BWSAR funds)	\$17,500.00
City of Beaufort (ATAX funds)	\$17,500.00
Purchase R8 (replacement) Bluffton	\$43,750.00
(BWSAR funds)	\$21,875.00
Bluffton City (ATAX funds)	\$21,875.00
<b>Total</b>	<b>\$142,660.00</b>



**Beaufort Water Search & Rescue  
Board Meeting Minutes  
Date: 03 March 2026  
Chief: Clay Emminger**

I. Call to order at 1800 hours by board chair Ben Whitmore

II. Roll Call

Present:

- Ben Whitmore
- Will Gill
- Ben Burnett
- Patrick Canning
- Justin Owen

III. New Business

- Discussion over replacement of Bluffton Unit R-8 not to exceed \$43,750.00
- Discussion over Marketing/Advertising BWSAR in order to raise public awareness of our organization regarding safety infrastructure, build visitor confidence in the boating community and tourism development, not to exceed \$15,000.00
- Proceed with ATAX funding applications in the first quarter of the new year.

IV. Old Business;

- Replacement asset located for purchase R-9 replacement boat asking price \$39,000, schedule inspection and evaluate.

V. Adjournment at 1900 hours;

- Motion approved: B. Whitmore
- Second B. Burnett

TOWN OF BLUFFTON ATAX GRANT APPLICATION SCORING SHEET

Entity: **Beaufort Water Search and Rescue**

Project: **Purchase of Boat**

Project Type: **Facilities**

Scoring Category	Points Possible	Points Awarded
<b>ADVERTISING</b>	<b>15</b>	
<b>Part 1: Five (5) points possible. Based on how much of the requested funds go toward advertising.</b>		
0% of funds go toward advertising	0 points	
1% - 20% of funds go toward advertising	1 point	
21% - 40% of funds go toward advertising	2 points	
41% - 60% of funds go toward advertising	3 points	
61% - 80% of funds go toward advertising	4 points	
81% - 100% of funds go toward advertising	5 points	
<b>Part 2: Ten (10) points possible. Based on where the advertising is placed.</b>		
None of the funds go toward advertising	0 points	
Local newspapers/periodicals and electronic advertising (ex. Island Packet, The Bluffton Sun)	2 points	
Local guides/periodicals specifically geared toward tourists with a shelf life of more than 30 days	4 points	
Larger regional publications and electronic marketing within 100 miles (ex. Charleston or Savannah news outlets)	6 points	
Newspapers/periodicals/electronic marketing to large, metropolitan areas outside of 100 miles away (ex. Atlanta, Charlotte, Washington, D.C., Chicago)	8 points	
Nationally distributed newspapers/periodicals/electronic marketing (ex. USA Today, NY Times, Southern Living Magazine)	10 points	
<b>TOURIST FACILITIES</b>	<b>15</b>	
Higher point value given based on anticipated ratio of tourists to locals		
<b>FESTIVAL/EVENT</b>	<b>5</b>	
Higher point value given to requests for festivals or events		
Length of event/festival should be considered. Is it an all-day event versus a two-hour event? Multi-day event?		
<b>BLUFFTON EVENT</b>	<b>5</b>	
Higher point value given to events held within the town limits of Bluffton and/or spanning multiple locations		
<b>TOURISM DRAW</b>	<b>5</b>	
0% of attendees are tourists based on historical or projected information	0 points	
1% - 20% of attendees are tourists based on historical or projected info	1 point	
21% - 40% of attendees are tourists based on historical or projected info	2 points	
41% - 60% of attendees are tourists based on historical or projected info	3 points	
61% - 80% of attendees are tourists based on historical or projected info	4 points	
81% - 100% of attendees are tourists based on historical or projected info	5 points	
<b>BENEFIT TO TOURISM (LOCAL ECONOMY)</b>	<b>5</b>	
Higher point value given to events that encourage overnight stays and/or have local business participation		
<b>SELF SUFFICIENCY</b>	<b>5</b>	
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	
<b>MISCELLANEOUS</b>	<b>10</b>	
Only use if applicant does not qualify as a festival/event		
<b>Group Average Point Total (out of a possible 40 points)</b>		<b>0</b>
<b>Group Average Percentage</b>		

**ACCOMMODATIONS TAX ADVISORY COMMITTEE  
STAFF REPORT  
Department of Finance & Administration**



MEETING DATE: May 19, 2026  
 SUBJECT: Beaufort Water Search and Rescue: Marketing/Advertising  
 PROJECT MANAGER: Jeremy Bullock, Grants Administrator

Summarized below is the application from Beaufort Water Search and Rescue for Accommodations Tax grant dollars in support of a targeted FY26 Tourism Safety Awareness and Marketing Campaign.

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

**Total Budget: \$15,000**  
**Requested Amount: \$7,500**  
**Percentage of Request^: 50%**

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

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Budget per Category (based on Budget Form), corrected as needed	
Advertising & Promotion of Tourism or Arts and Cultural Events	\$8,270	
Facilities for Civic and Cultural Events	-	
Public Facilities	-	*
Municipality and County Services	-	*
Tourist Transportation	-	*
Other/Ineligible Project Expenses	\$6,730	
<b>Total</b>	<b>\$15,000</b>	

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

**Budgeted Expenses Summary:**

Advertising & Promotion:

Total budget \$8,270

- Social media, e-mail, texts, postcards, graphic design and posters/banners/signage

Other/Ineligible Project Expenses:

Total Budget: \$6,730

- Photography and video, website improvements beyond tourism, project coordination and oversight, contingency

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

Amount Requested	Advertising (15)	Tourism Draw % (5)	Benefit to Tourism (5)	Self-Sufficiency % (5)	Miscellaneous (10)	Total of 40 possible	Comments
\$7,500	4	0	1	2	1	9	

Advertising: Comprises 100% of the funds requested. The campaign will increase public visibility of BWSAR as the primary on-water emergency response. Advertising includes geo-targeted digital advertising, production of print materials including rack cards, boater safety cards, event banners, and QR-code signs for public boat ramps and marinas.

Tourism Draw %: Visitor confidence of Bluffton’s waterways will be improved by reassuring tourists that professional, 24/7 on-water emergency support is readily available.

Benefit to Tourism: The campaign will directly benefit tourism in Bluffton by increasing visitor confidence in the safety of the Town’s waterways. This project supports the Town’s tourism economy by promoting safe access to its natural attractions and helps sustain the high volume of tourism events and activities that rely on reliable waterway safety.

Self-Sufficiency % (Financial Need): Eligible amount requested is 50% of total expenses budget. Revenues of \$7,500 (not including an ATAX award) are anticipated from donations, fundraising and reserves.

Previous Funding Amounts							
Fiscal Year	Requested Amount	% of Budget	Advisory Committee Recommendation	Town Council Approved	Expended	Lapsed	Comments
N/A							

Accommodations Tax Committee Recommendations and Comments:  
The committee feels this initiative does not attract tourists to the area and therefore, does not fit the intent of the accommodations tax grant program.

The Committee recommends funding \$ 0 for a marketing campaign targeting boater safety.

**Bullock, Jeremy**

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**From:** noreply@civicplus.com  
**Sent:** Tuesday, March 31, 2026 10:46 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

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## TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

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

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

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(Section Break)

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Application Date 3/31/2026

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Project Name BWSAR Marketing/Advertising

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Project/Event Location Bluffton District

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Is this a new project or event? No

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Project/Event Start Date: 7/1/2026

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Project/Event End Date 6/30/2027

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Multi-Year Project/Event? No

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Total Project Costs	\$15000
Total ATAX Funds Requested	\$7500
Percent of Total Budget	50
Date the funds are needed:	7/1/2026
Full Legal Organization Name	Beaufort Water Search And Rescue
Address	817 Paris Ave.
Street Address Line 2	<i>Field not completed.</i>
City	Port Royal
State	SC
Zip Code	29935
Applicant must be designated as a non-profit entity to receive ATAX funds. Is your entity a non-profit organization?	Yes

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

Organization Primary Point of Contact

First Name	Patrick
Last Name	Canning
Title	Board Member
Phone Number	484-764-5570
E-mail Address	<a href="mailto:patrick.canning@bwsar.org">patrick.canning@bwsar.org</a>

(Section Break)

Organization Secondary Point of Contact

First Name	Clay
------------	------

Last Name	Emminger
Title	Chief
Phone Number	843-525-1969
E-mail Address	<a href="mailto:clay.emminger@bwsar.org">clay.emminger@bwsar.org</a>

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

**Project Description:** The purpose of the \$7,500 requested from the Town of Bluffton ATAX is to fund a targeted FY 2026 Tourism Safety Awareness & Marketing Campaign for Beaufort Water Search and Rescue (BWSAR). This campaign will significantly increase public visibility of BWSAR as the primary on-water emergency response organization serving Bluffton’s waterways. Funds will support three key components:

- Development of professional brand standards, photography, and a new visitor-friendly WordPress website;
- Geo-targeted digital advertising on Facebook, Instagram, and Nextdoor;
- Production of print materials including rack cards, boater safety cards, event banners, and QR-code signs for public boat ramps and marinas.

All materials will prominently feature the required “Heart of the Lowcountry” branding and hashtags. The campaign focuses on promoting safe enjoyment of Bluffton’s May River and Calibogue Sound while educating tourists and boaters about BWSAR’s 24/7 availability for search, rescue, and recovery. This project complies with SC Code §6-4-10(4)(b)(i) as advertising and promotion of tourism by enhancing visitor confidence on local waterways — a major driver of tourism in Bluffton.

**List any required permits, if applicable. If none, type “N/A”:** N/A

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

The FY 2026 campaign consists of three integrated components designed to build awareness and promote safe waterway tourism in Bluffton:

Brand and Web Foundation: Update brand standards, professional photography/video, and launch a new mobile-friendly WordPress website (replacing the current Google Sites page) with clear safety information, donation tools, and visitor resources.

Local Awareness Advertising: Geo-targeted digital ads on Facebook, Instagram, and Nextdoor reaching residents and repeat visitors in the Bluffton/Beaufort area. This includes evergreen safety messaging plus three two-week intensive campaign pushes timed to BWSAR’s annual fundraising events.

Print and Community Presence: Production of rack cards, dual-purpose boater safety cards, event banners, vehicle/vessel decals, and QR-code dock signs for placement at public boat ramps, marinas, bait shops, and community gathering points in and around Bluffton. These materials will circulate indefinitely.

All advertising and promotional materials will incorporate the official Town of Bluffton “Heart of the Lowcountry” logo and required hashtags (#LoveBlufftonSC, #HeartoftheLowcountry, #TownofBluffton). Budget allocation is as follows:

- Graphic Design & Photography: \$3,300
- Digital Advertising: \$3,050
- Print Materials & Signage: \$2,720
- Website Development & Hosting: \$2,100
- Contingency: \$1,830 (covered by matching funds)

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

Facebook, Instagram, Nextdoor, Email blasts, and print materials (rack cards, boater safety cards, banners, and QR signs) distributed at Bluffton boat ramps and marinas. All materials will use required Town of Bluffton branding and hashtags.

**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:

This campaign will directly benefit tourism in Bluffton by increasing visitor confidence in the safety of the Town’s waterways. Bluffton attracts thousands of tourists each year for boating, kayaking, fishing, paddle sports, and waterfront activities along the May River and Calibogue Sound. By making BWSAR more visible and recognizable, the campaign reassures tourists that professional, 24/7 on-water emergency support is readily available. This enhanced perception of safety encourages greater participation in water-based recreation, longer visitor stays, and repeat visitation —

all of which increase overnight accommodations, dining, and local spending within Bluffton town limits.

The project supports the Town's tourism economy by promoting safe access to its natural attractions and helping sustain the high volume of tourism events and activities that rely on reliable waterway safety. In 2023, water-related activities generated over \$241 million in direct tourism spending county-wide. Strengthening public awareness of BWSAR helps protect and grow this important economic driver for Bluffton.

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

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

**Additional Comments:** BWSAR is a 100% all-volunteer organization with over 50 years of service to the Lowcountry. In the past year, our 40 members responded to 97 water emergencies (a 65% increase) while providing safety patrols at more than 16 tourism-related events. Despite this critical role, the organization remains largely unknown to the visiting public. This modest investment in basic visibility will improve our ability to serve tourists and boaters, recruit volunteers, and build the sustained community support needed to continue operations. All expenditures will be properly documented, and we will provide the Town with copies of all advertising materials and performance metrics (impressions, website traffic, and engagement) upon project completion.

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

### **FINANCIAL INFORMATION**

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

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

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

Town's required Line-Item Budget Form:	<a href="#">ATAX-Grant-Application-Line-Item-Budget-Form.pdf</a>
Most Recent Fiscal Year Balance Sheet and Profit and Loss Accounting Statement	<a href="#">Profit and Loss worksheet.pdf</a>
Financial Guarantee	<a href="#">2026.3.3 Meeting Minutes (Board).pdf</a>

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

Please attach Budget vs. Actual statements for prior two years events.	<a href="#">Budget- Actual FY2025 ATAC award.pdf</a>
Please attach Budget vs. Actual statements for prior two years events.	<a href="#">Budget- Actual FY2025 ATAC award 1.pdf</a>

(Section Break)

Have you requested, received, or been awarded ATAX funding from other state or local entities for this project/event?	No
Have you received or been awarded ATAX funding from other state or local entities for any other project/event?	Yes
Awarding Agency	Beaufort City ATAC

Amount	\$17,500
Project/Event	Assest replacement R-9, (Buffton District)
Year of Award	2026
Awarding Agency	Beaufort City ATAC
Amount	\$20,000
Project/Event	Asset replacement R-4, (county wide services)
Year of Award	2025

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

**PRIOR RECIPIENT'S REPORT**

If your organization has received ATAX funding from the Town of Bluffton in previous years, you must complete the below information.

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

Has your organization previously received ATAX funds from the Town of Bluffton? No

(Section Break)

Please attach a copy of your organization's IRS Designation Letter showing your non-profit status . [IRS Letter 947.pdf](#)

Please upload a copy of your current Town of Bluffton Business License, which is required of all applicants. [exemption.pdf](#)

Additional Application Documents *Field not completed.*

Additional Application Documents *Field not completed.*

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Additional Application Documents *Field not completed.*

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Additional Application Documents *Field not completed.*

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**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

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

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

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

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

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

---

Signature Patrick Canning

---

Signatory's Title or  
Position

Board Member

---

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



INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Section X. Item #6.

Date: **NOV 27 2017**

BEAUFORT WATER SEARCH RESCUE  
817 PARIS AVENUE  
PORT ROYAL, SC 29935-0000

Employer Identification Number:  
57-1126299  
DLN:  
26053706001137  
Contact Person:  
CUSTOMER SERVICE ID# 31954  
Contact Telephone Number:  
(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:  
May 15, 2017  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

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.

Based on the information you submitted in your application, we approved your request for reinstatement under Revenue Procedure 2014-11. Your effective date of exemption, as listed at the top of this letter, is retroactive to your date of revocation.

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](http://www.irs.gov/charities). Enter "4221-PC" in the search bar

Letter 947

Beaufort Water Search And Rescue responds at the direction of the Beaufort County Emergency Management office in the event of a water emergency.

We are not a business nor non-profit that charges for services or collects sales taxes, therefore we do not believe we have the need for a business license.

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

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

**REVENUES**

**Revenues - Cash**

	Sponsorships	\$	
	Donations	\$	3,000
	ATAX Grants/Funding from Other Entities*	\$	0
<i>* Do <b>NOT</b> include anticipated award funds requested in this application</i>			
Other Grants (please name):		\$	0
Other Grants (please name):		\$	0
Other Grants (please name):		\$	0
	Vendor Fees	\$	0
	Registration Fees	\$	0
Other Fees (please name):		\$	0
Other Fees (please name):		\$	0
	Mercandise Sales	\$	0
Other Sales (please name):		\$	0
Other Sales (please name):		\$	0
Other Revenue (please name):BWSAR reserves & fundraising		\$	4,500
Other Revenue (please name):		\$	

**Revenues - In-Kind Contributions**

	Volunteer Hours	\$	0
	Donated Items	\$	
	Donated Services	\$	
Other (please name):		\$	
Other (please name):		\$	
Other (please name):		\$	

**Total All Revenue Sources: \$ 7,500**

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

**EXPENSES**

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

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

	<b>Amount</b>
<b>Advertising &amp; Promotion of Tourism or Arts and Cultural Events</b>	
Local Newspaper/Digital Advertising	\$ 0
Regional Newspaper/Digital Advertising	\$ 0
National Newspaper/Digital Advertising	\$ 0
Local Magazine/Digital Advertising	\$ 0
Regional Magazine/Digital Advertising	\$ 0
National Magazine/Digital Advertising	\$ 0
Local Radio Advertising	\$ 0
Regional Radio Advertising	\$ 0
National Radio Advertising	\$ 0
Local Television Advertising	\$ 0
Regional Television Advertising	\$ 0
National Television Advertising	\$ 0
Billboards	\$ 0
Social Media Advertising	\$ 2,550
E-mail and/or Text Blasts	\$ 500
Postcards/Mailers	\$ 1,800
Posters/Banners/Signage	\$ 920
Graphic Design of Marketing/Writing or Press Releases	\$ 2,200
Web Hosting for <b>Event</b> (not organization)	\$ 300
Other (please name):	\$ 0
Other (please name):	\$ 0
Other (please name):	\$ 0
Other (please name):	\$ 0
Other (please name):	\$ 0
<b>Total Advertising/Promotion Budget:</b>	<b>\$ 8,270</b>
<b>Facilities for Civic and Cultural Events</b>	
Rentals: Venue(s)	\$ 0
Rentals: Parking Lots	\$ 0
Rentals: Tables, Chairs, Stages, Tents	\$ 0
Rental: Sound, Audio Equipment	\$ 0
Construction/Renovations/Repairs of Buildings/Facilities	\$ 0
Other (please name):	\$ 0
Other (please name):	\$ 0
Other (please name):	\$ 0
<b>Total Facilities Budget:</b>	<b>\$ 0</b>

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

**EXPENSES**

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

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

	<b>Amount</b>
<b>Tourist Transportation</b>	
Company Name: _____	\$ 0
Company Name: _____	\$ 0
<b>Total Transportation Budget:</b>	\$ 0
<b>Public Facilities</b>	
Temporary/Portable Restrooms	\$ 0
Dumpster Rental/Trash Hauling	\$ 0
Construction of Permanent Restrooms	\$ 0
Construction of Parks	\$ 0
Construction of Parking Lots	\$ 0
Other (please name): _____	\$ 0
Other (please name): _____	\$ 0
<b>Total Public Facilities Budget:</b>	\$ 0
<b>Municipality and County Services</b>	
Security Provided by Bluffton Police Department	\$ 0
Security <b>NOT</b> Provided by Bluffton Police Department	\$ 0
<b>Total Municipality/County Services Budget:</b>	\$ 0
<b>Operations <i>(only applicable to Visitor Centers and/or Cultural Centers/Museums)</i></b>	
Marketing/Advertising	\$ 0
Utilities <i>(electric, gas, water, phone service, internet, etc.)</i>	\$ 0
Subscriptions <i>(not related to marketing/advertising services)</i>	\$ 0
Supplies <i>(office, janitorial, etc.)</i>	\$ 0
Facility Maintenance <i>(i.e. cleaning, pest control, landscaping, etc.)</i>	\$ 0
Minor Repairs	\$ 0
Other (please name): _____	\$ 0
Other (please name): _____	\$ 0
Other (please name): _____	\$ 0
Other (please name): _____	\$ 0
<b>Total Operations Budget:</b>	\$ 0
<b>Total ALL ATAX Eligible Expenses:</b>	\$ 8,270

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

**EXPENSES**

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

**Other/Ineligible Expenses**

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

<b>Item</b>		<b>Amount</b>
Photography Video for ads	\$	1,100
Website improvements beyond basic tourism (SEO donation form full content)	\$	1,800
Project coordination, oversight (ineligible management/creative direction)	\$	1,830
Additional Marketing Materials & Contingency	\$	2,000
_____	\$	0
_____	\$	0
_____	\$	0
_____	\$	0
_____	\$	0
_____	\$	0
_____	\$	0
_____	\$	0
_____	\$	0
<b>Total of Other/Ineligible Expenses:</b>	<b>\$</b>	<b>6,730</b>
<b>Total Project/Event Budget</b> <small>(all eligible ATAX categories + Ineligible Expenses) :</small>	<b>\$</b>	<b>15,000</b>
<b>Total Project/Event Profit or Loss</b> <small>(Total Revenue minus Total Project/Event Budget) :</small>	<b>\$</b>	<b>(7,500)</b>

**Statement Of Accounts (2025 fiscal year)**

July 1, 2024 thru June 30. 2025

**Revenues**

Individual Donations	\$3,000.00
fiscal 2024 carry forward	\$22,937.60
Beaufort County Grant	\$40,000.00
Beaufort City Grant	\$20,000.00
County Stipend (\$2,500 quarterly)	\$10,000.00
Asset Sales	\$14,200.00
Fundraising	\$40,562.00
<b>Total</b>	<b>\$150,699.60</b>

**Expenses**

General Administrative Expense	\$7,691.43
Maintenance	\$11,871.00
Equipment Purchases	\$14,333.30
Fuel Expense	\$1,364.16
Insurance	\$6,074.21
Utilities	\$8,607.86
Purchase of R4	\$35,670.00
Purchase of Rigid Inflatable	\$15,516.00
<b>Total</b>	<b>\$101,127.96</b>

Net \$49,571.64

**Statement Of Accounts (2026 fiscal year)**

July 1, 2025 thru June 30. 2026

**Revenues**

Individual Donations	\$3,000.00
fiscal 2024 carry forward	\$49,571.64
County Stipend	\$50,000.00
Asset Sales (anticipated)	\$22,000.00
Fundraising	\$26,000.00
<b>Total</b>	<b>\$150,571.64</b>

**Expenses**

General Administrative Expense	\$2,500.00	
Maintenance	\$7,250.00	
Equipment Purchases	\$12,000.00	
taxes	\$4,250.00	
Fuel Expense	\$3,000.00	
Insurance	\$6,250.00	
Utilities	\$6,650.00	
Fundraising expense	\$5,000.00	
Marketing/Promotional (BWSAR funds)	\$15,000.00	\$7,500.00
Bluffton City (ATAX funds)		\$7,500.00
Equipment Purchase R9 (replacement) Bluffton (BWSAR funds)	\$37,010.00	\$17,500.00
City of Beaufort (ATAX funds)		\$17,500.00
Purchase R8 (replacement) Bluffton (BWSAR funds)	\$43,750.00	\$21,875.00
Bluffton City (ATAX funds)		\$21,875.00
<b>Total</b>	<b>\$142,660.00</b>	



**Beaufort Water Search & Rescue  
Board Meeting Minutes  
Date: 03 March 2026  
Chief: Clay Emminger**

I. Call to order at 1800 hours by board chair Ben Whitmore

II. Roll Call

Present:

- Ben Whitmore
- Will Gill
- Ben Burnett
- Patrick Canning
- Justin Owen

III. New Business

- Discussion over replacement of Bluffton Unit R-8 not to exceed \$43,750.00
- Discussion over Marketing/Advertising BWSAR in order to raise public awareness of our organization regarding safety infrastructure, build visitor confidence in the boating community and tourism development, not to exceed \$15,000.00
- Proceed with ATAX funding applications in the first quarter of the new year.

IV. Old Business;

- Replacement asset located for purchase R-9 replacement boat asking price \$39,000, schedule inspection and evaluate.

V. Adjournment at 1900 hours;

- Motion approved: B. Whitmore
- Second B. Burnett

<b>Category</b>	<b>Budgeted Amount</b>	<b>Actual Amount</b>	<b>Variance Notes</b>	
Boat Purchase (including motor & trailer)	\$45,000	\$45,683	+\$683	Minor variance due to final negotiated price and taxes/fees
ATAX Grant Funds Used	\$20,000	\$20,000	\$0	Fully expended as awarded
<b>Total Project Cost</b>	<b>\$45,000</b>	<b>\$45,683</b>	<b>+\$683</b>	Project completed successfully

Beaufort City ATAC award FY2025 for Asset replacement R-4, (Beaufort county service district) in the amount of \$20,000 for the purchase of a 2005 Grady White 203 in the amount of \$45,683, with a budget of \$45,000

TOWN OF BLUFFTON ATAX GRANT APPLICATION SCORING SHEET

Entity: **Beaufort Water Search and Rescue**

Project: **FY2026 BWSAR Marketing/Advertising**

Project Type: **Advertising**

Scoring Category	Points Possible	Points Awarded
<b>ADVERTISING</b>	<b>15</b>	
<b>Part 1: Five (5) points possible. Based on how much of the requested funds go toward advertising.</b>		
0% of funds go toward advertising	0 points	
1% - 20% of funds go toward advertising	1 point	
21% - 40% of funds go toward advertising	2 points	
41% - 60% of funds go toward advertising	3 points	
61% - 80% of funds go toward advertising	4 points	
81% - 100% of funds go toward advertising	5 points	
<b>Part 2: Ten (10) points possible. Based on where the advertising is placed.</b>		
None of the funds go toward advertising	0 points	
Local newspapers/periodicals and electronic advertising (ex. Island Packet, The Bluffton Sun)	2 points	
Local guides/periodicals specifically geared toward tourists with a shelf life of more than 30 days	4 points	
Larger regional publications and electronic marketing within 100 miles (ex. Charleston or Savannah news outlets)	6 points	
Newspapers/periodicals/electronic marketing to large, metropolitan areas outside of 100 miles away (ex. Atlanta, Charlotte, Washington, D.C., Chicago)	8 points	
Nationally distributed newspapers/periodicals/electronic marketing (ex. USA Today, NY Times, Southern Living Magazine)	10 points	
<b>TOURIST FACILITIES</b>	<b>15</b>	
Higher point value given based on anticipated ratio of tourists to locals		
<b>FESTIVAL/EVENT</b>	<b>5</b>	
Higher point value given to requests for festivals or events		
Length of event/festival should be considered. Is it an all-day event versus a two-hour event? Multi-day event?		
<b>BLUFFTON EVENT</b>	<b>5</b>	
Higher point value given to events held within the town limits of Bluffton and/or spanning multiple locations		
<b>TOURISM DRAW</b>	<b>5</b>	
0% of attendees are tourists based on historical or projected information	0 points	
1% - 20% of attendees are tourists based on historical or projected info	1 point	
21% - 40% of attendees are tourists based on historical or projected info	2 points	
41% - 60% of attendees are tourists based on historical or projected info	3 points	
61% - 80% of attendees are tourists based on historical or projected info	4 points	
81% - 100% of attendees are tourists based on historical or projected info	5 points	
<b>BENEFIT TO TOURISM (LOCAL ECONOMY)</b>	<b>5</b>	
Higher point value given to events that encourage overnight stays and/or have local business participation		
<b>SELF SUFFICIENCY</b>	<b>5</b>	
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	
<b>MISCELLANEOUS</b>	<b>10</b>	
Only use if applicant does not qualify as a festival/event		
<b>Group Average Point Total (out of a possible 40 points)</b>		<b>0</b>
<b>Group Average Percentage</b>		

**ACCOMMODATIONS TAX ADVISORY COMMITTEE  
STAFF REPORT  
Department of Finance & Administration**



MEETING DATE: May 19, 2026  
 SUBJECT: The Bluffton MLK Observance Committee: 11<sup>th</sup> Annual Bluffton Juneteenth Festival  
 PROJECT MANAGER: Jeremy Bullock, Grants 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 11<sup>th</sup> Annual Bluffton Juneteenth Festival.

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

**Total Budget: \$41,000**  
**Requested Amount: \$20,000**  
**Percentage of Request^: 48.8%**

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

Eligible Tourism-Related Expense Categories (per SC Code of Laws)	Budget per Category (based on Budget Form), corrected as needed	
Advertising & Promotion of Tourism or Arts and Cultural Events	\$12,600**	
Facilities for Civic and Cultural Events	11,500	
Public Facilities	3,250	*
Municipality and County Services	2,100	*
Tourist Transportation	400	*
Other/Ineligible Project Expenses	21,500**	
<b>Total</b>	<b>\$51,350</b>	

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

**Budgeted Expenses Summary:**

Advertising & Promotion:

Total budget \$12,600\*\*

- Design of ads, local and national radio, social media, posters/signage, and website
- Influencer Marketing moved to "Other/Ineligible Project Expenses" category

Facilities for Civic and Cultural Events:

Total budget \$11,500

- Rentals of tent, stage, chairs, sound and audio equipment

Public Facilities:

Total budget \$3,250

- Temporary restrooms and sanitation expenses

Municipality and County Services:

Total budget \$2,100

- Event Security

Tourist Transportation:

Total budget \$400

- For Shuttles/Trolleys via Bluffton Breeze

Other/Ineligible Project Expenses:

Total budget \$21,500\*\*

- Expenses related to catering, entertainment, photography and influencer marketing

**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
\$20,000	10	5	5	3	4	3	29	

Advertising: Of the requested funds, approximately 63% is related to advertising and promotion. Advertising will run on WSAV, WTOG, WHHI, iHeart Radio, 94.1 Da Beat FM, E93 Jamz, 104.1, and the Black Food Fridays and Cocktail Bandits social media accounts.

Festival/Event: June 19<sup>th</sup>-June 21<sup>st</sup> at Ma Daisy’s Porch celebrating Bluffton’s rich cultural heritage. The Friday and Saturday events will be family-friendly and feature food trucks, vendors, entertainment, and a play area. Saturday will feature Gullah storytelling. Sunday will be adults only and be kicked off with a Gullah brunch.

Bluffton Event: The entire event will be held at Ma Daisy’s Porch.

Tourism Draw %: The event has grown from less than 100 attendees at the inaugural event in 2015 to 10,000+ in 2025 with over 40% being tourists. Tourists come from Savannah, Charleston, Charlotte, South Florida, California, Baltimore and the Canary Islands.

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 38.9% of the total projected festival budget of \$51,350. Other sources of income include sponsorships, donations, vendor and registration fees as well as in-kind contributions.

**Previous Funding Amounts**

Fiscal Year	Requested Amount	% of Budget	Advisory Committee Recommendation	Town Council Approved	Expended	Lapsed	Comments
2025	\$23,000	46%	\$23,000	\$23,000	\$17,167	\$5,833	Final Report Submitted
2024	\$20,000	41%	\$20,000	\$20,000	\$16,908	\$3,092	Final Report Submitted
2023	\$20,000	40%	\$20,000	\$20,000	\$13,571	\$6,429	Final Report Submitted

Accommodations Tax Committee Recommendations and Comments:  
none

The Committee recommends funding \$ 20,000 for the 11<sup>th</sup> Annual Juneteenth Celebration.

**Bullock, Jeremy**

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**From:** noreply@civicplus.com  
**Sent:** Tuesday, March 31, 2026 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

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## TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

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

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

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(Section Break)

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Application Date	3/31/2026
Project Name	11th Bluffton Juneteenth Festival
Project/Event Location	May River Rd/Bluffton
Is this a new project or event?	No
Project/Event Start Date:	6/19/2026
Project/Event End Date	6/21/2026
Multi-Year Project/Event?	No

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Total Project Costs	41,000
<hr/>	
Total ATAX Funds Requested	20,000
<hr/>	
Percent of Total Budget	50
<hr/>	
Date the funds are needed:	6/22/2026
<hr/>	
Full Legal Organization Name	BLUFFTON MLK OBSERVANCE COMMITTEE
<hr/>	
Address	236 BUCK ISLAND RD
<hr/>	
Street Address Line 2	<i>Field not completed.</i>
<hr/>	
City	BLUFFTON
<hr/>	
State	South Carolina
<hr/>	
Zip Code	29910-5938
<hr/>	
Applicant must be designated as a non-profit entity to receive ATAX funds. Is your entity a non-profit organization?	Yes

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

Organization Primary Point of Contact

First Name	Jacquelyn
<hr/>	
Last Name	Brown
<hr/>	
Title	Secretary
<hr/>	
Phone Number	843-220-0485
<hr/>	
E-mail Address	<a href="mailto:jiebrown@yahoo.com">jiebrown@yahoo.com</a>

(Section Break)

Organization Secondary Point of Contact

First Name	<i>Field not completed.</i>
------------	-----------------------------

Last Name *Field not completed.*

---

Title *Field not completed.*

---

Phone Number *Field not completed.*

---

E-mail Address *Field not completed.*

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**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

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**Project Description:** The Juneteenth events, scheduled for June 19th-June 21st at Ma Daisy's Porch will celebrate Bluffton's rich, cultural heritage while spotlighting some of the amazing, local talent from our black community.

The Friday event will be family-friendly and free of charge to the public, and will attract locals and tourists alike. Locally and regionally Black-owned food truck vendors will setup to sell and array of culture cuisine favorites. Guests will be invited to purchase food and goods from participating vendors. Kids can enjoy a play area and all can enjoy the live entertainment provided by some of the area's hottest entertainers and djs. Other sources of event revenue will include sponsorships, booth rentals, reserved event seating, and retail sales.

The Saturday event will also be family-friendly and free of charge to the public, and the event will attract locals and tourists alike. An outlined program will include a proclamation from the Mayor, a drum circle, Gullah storytelling, and much, much more. Guests will be invited to purchase food and goods from participating vendors. Kids can enjoy a play area and all can enjoy the live entertainment provided by some of the area's hottest entertainers and djs. Other sources of event revenue will include sponsorships, booth rentals, reserved event seating, and retail sales.

The Sunday event will be an adults-only ticketed event serving a Gullah brunch prepared by local chefs, complete with mimosas, bloody mary's, and sweet, iced tea. Guests will enjoy music by jazz saxophonist Nate Myers IV, Atlanta, GA.

List any required permits, if applicable. If none, type "N/A": ABL Permit, Special Events, Road Closure

---

Describe all planned advertising and marketing for this project/event: Advertising for the event will be promoted through social media influencers, via radio promotions, digital ads, flyers displayed at local businesses, and through

---

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

WHHI, WSAV, WTOG, Facebook, Instagram, TikTok, Charleston Black Professionals, IHeart Radio, 94.1 Da Beat, E93 Jamz, 104.1, Black Food Fridays (socials), Cocktail Bandits (socials)

**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 Bluffton Juneteenth Event has seen an enormous growth of attendees and tourists. In 2015 when first established the event drew less than 100 attendees as of last year the weekend drew 10,000+ tourists with over 40% being tourists. We attract tourist that travel as close as Savannah, Charleston, Charlotte, and other regional locations and as far as South Florida, California, Baltimore, The Canary Islands, and other destinations.

With our expanded plans for advertising, we plan to continue to promote Bluffton's Juneteenth Celebration as a 3-day weekend event and will include accommodations information on all advertising.

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

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

Additional Comments: *Field not completed.*

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

**FINANCIAL INFORMATION**

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

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

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

Town’s required Line-Item Budget Form:	<a href="#">26ATAX Grant Application Line-Item Budget 202410070635418371.pdf</a>
Most Recent Fiscal Year Balance Sheet and Profit and Loss Accounting Statement	<a href="#">MLK 2025 Financial Statement - Sheet1.pdf</a>
Financial Guarantee	<a href="#">MLK Meeting Minutes November 2025 Minutes.docx.pdf</a>

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

Please attach Budget vs. Actual statements for prior two years events.	<a href="#">2025 ATAC Itemized Expenses - Reimbursement Request.xlsx - Sheet1.pdf</a>
Please attach Budget vs. Actual statements for prior two years events.	<a href="#">2024 ATAC Itemized Expenses - Reimbursement Request.xlsx</a>

(Section Break)

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

funding from other  
state or local entities  
for any other  
project/event?

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

**PRIOR RECIPIENT'S REPORT**

If your organization has received ATAX funding from the Town of Bluffton in previous years, you must complete the below information.

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

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

Yes

Project/Event Name

Bluffton Juneteenth

Year Awarded

2025

Amount Awarded

17,800

Was a final report  
submitted?

Yes

What was the total  
number of tourists?

6,000

What was the  
percentage of tourists?

40

(Section Break)

Please attach a copy of  
your organization's IRS  
Designation Letter  
showing your non-  
profit status .

[Bluffton MLK 501\(c\)3 \(1\).jpg](#)

Please upload a copy  
of your current Town of  
Bluffton Business  
License, which is

[Report Permit60503 638833308579658084 260331 163235.pdf](#)

required of all applicants.

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Additional Application Documents *Field not completed.*

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Additional Application Documents *Field not completed.*

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Additional Application Documents *Field not completed.*

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Additional Application Documents *Field not completed.*

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Additional Comments *Field not completed.*

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**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

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

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

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

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

**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
-----------	-----------------

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Signatory's Title or Position	Secretary
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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

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

ATTN: [Redacted]  
Section X. Item #6.

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](http://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,

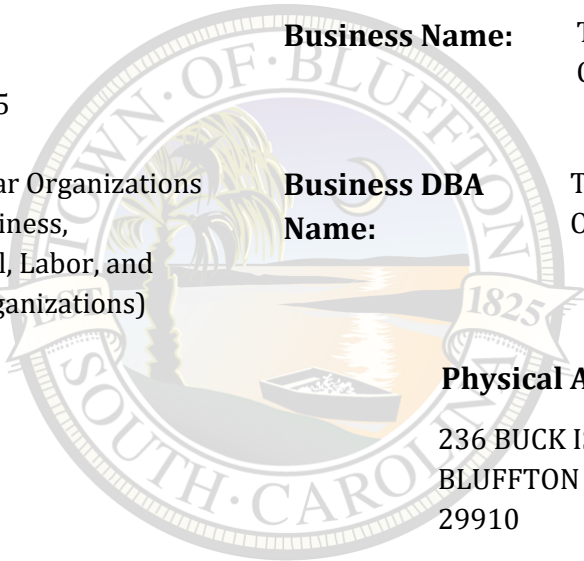
Stephen A. Martin  
Director, Exempt Organizations  
Rulings and Agreements

# TOWN OF BLUFFTON

## TOWN OF BLUFFTON -

### Expires:04/30/2026

<b>License No.</b>	25-05-0534	<b>Business Name:</b>	The Bluffton MLK Observance Committee
<b>Date Issued:</b>	05/20/2025		
<b>NAICS Title:</b>	Other Similar Organizations (except Business, Professional, Labor, and Political Organizations)	<b>Business DBA Name:</b>	The Bluffton MLK Observance Committee
<b>Business Type:</b>	Civic/Social Non-Profit	<b>Physical Address:</b>	236 BUCK ISLAND RD 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.

Bridgette Frazier  
The Bluffton MLK Observance Committee  
PO Box 3737  
Bluffton, SC 29910

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

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

**REVENUES**

**Revenues - Cash**

Sponsorships     \$ \_\_\_\_\_ 10,000

Donations     \$ \_\_\_\_\_ 2,000

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

*\* Do **NOT** include anticipated award funds requested in this application*

Other Grants (please name): \_\_\_\_\_ \$ \_\_\_\_\_

Other Grants (please name): \_\_\_\_\_ \$ \_\_\_\_\_

Other Grants (please name): \_\_\_\_\_ \$ \_\_\_\_\_

Vendor Fees     \$ \_\_\_\_\_ 3,000

Registration Fees     \$ \_\_\_\_\_ 600

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

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

Mercandise Sales     \$ \_\_\_\_\_

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

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

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

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

**Revenues - In-Kind Contributions**

Volunteer Hours     \$ \_\_\_\_\_ 1,500

Donated Items     \$ \_\_\_\_\_ 5,000

Donated Services     \$ \_\_\_\_\_ 15,000

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

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

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

**Total All Revenue Sources:     \$ \_\_\_\_\_ 37,100**

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

**EXPENSES**

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

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

	<b>Amount</b>
<b>Advertising &amp; Promotion of Tourism or Arts and Cultural Events</b>	
Local Newspaper/Digital Advertising	\$ 1,500
Regional Newspaper/Digital Advertising	\$ 1,000
National Newspaper/Digital Advertising	\$
Local Magazine/Digital Advertising	\$
Regional Magazine/Digital Advertising	\$
National Magazine/Digital Advertising	\$
Local Radio Advertising	\$ 1,000
Regional Radio Advertising	\$
National Radio Advertising	\$ 5,300
Local Television Advertising	\$
Regional Television Advertising	\$
National Television Advertising	\$
Billboards	\$
Social Media Advertising	\$ 2,000
E-mail and/or Text Blasts	\$
Postcards/Mailers	\$
Posters/Banners/Signage	\$ 800
Graphic Design of Marketing/Writing or Press Releases	\$ 500
Web Hosting for <b>Event</b> (not organization)	\$ 500
Other (please name): Influencer Marketing	\$ 3,000
Other (please name):	\$
Other (please name):	\$
Other (please name):	\$
Other (please name):	\$
<b>Total Advertising/Promotion Budget:</b>	<b>\$ 15,600</b>
<b>Facilities for Civic and Cultural Events</b>	
Rentals: Venue(s)	\$
Rentals: Parking Lots	\$
Rentals: Tables, Chairs, Stages, Tents	\$ 6,500
Rental: Sound, Audio Equipment	\$ 5,000
Construction/Renovations/Repairs of Buildings/Facilities	\$
Other (please name):	\$
Other (please name):	\$
Other (please name):	\$
<b>Total Facilities Budget:</b>	<b>\$ 11,500</b>

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

**EXPENSES**

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

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

	<b>Amount</b>
<b>Tourist Transportation</b>	
Company Name: Bluffton Breeze	\$ 400
Company Name:	\$
<b>Total Transportation Budget:</b>	<b>\$ 400</b>
<b>Public Facilities</b>	
Temporary/Portable Restrooms	\$ 1,900
Dumpster Rental/Trash Hauling	\$ 500
Construction of Permanent Restrooms	\$
Construction of Parks	\$
Construction of Parking Lots	\$
Other (please name): sanitation workers, cleaning companies (picking up trash :	\$ 850
Other (please name):	\$
<b>Total Public Facilities Budget:</b>	<b>\$ 3,250</b>
<b>Municipality and County Services</b>	
Security Provided by Bluffton Police Department	\$
Security <b>NOT</b> Provided by Bluffton Police Department	\$ 2,100
<b>Total Municipality/County Services Budget:</b>	<b>\$ 2,100</b>
<b>Operations <i>(only applicable to Visitor Centers and/or Cultural Centers/Museums)</i></b>	
Marketing/Advertising	\$
Utilities <i>(electric, gas, water, phone service, internet, etc.)</i>	\$
Subscriptions <i>(not related to marketing/advertising services)</i>	\$
Supplies <i>(office, janitorial, etc.)</i>	\$
Facility Maintenance <i>(i.e. cleaning, pest control, landscaping, etc.)</i>	\$
Minor Repairs	\$
Other (please name):	\$
Other (please name):	\$
Other (please name):	\$
Other (please name):	\$
<b>Total Operations Budget:</b>	<b>\$ 0</b>
<b>Total ALL ATAX Eligible Expenses:</b>	<b>\$ 32,850</b>

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

**EXPENSES**

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

**Other/Ineligible Expenses**

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

<b>Item</b>		<b>Amount</b>
DJ (June 13th)	\$	850
DJ (June 19th)	\$	500
DJ (June 20th)	\$	900
Live Band June 19th	\$	600
Live Band June 20th	\$	1,200
Live Band June 21st	\$	1,100
Sound System (June 19th)	\$	1,800
Stage & Sound System (June 20th)	\$	5,000
Event Photography	\$	1,500
Bouncee Inflatables	\$	1,550
Brunch Catering	\$	3,500
	\$	
	\$	
<b>Total of Other/Ineligible Expenses:</b>	<b>\$</b>	<b>18,500</b>
<b>Total Project/Event Budget</b> <small>(all eligible ATAX categories + Ineligible Expenses) :</small>	<b>\$</b>	<b>51,350</b>
<b>Total Project/Event Profit or Loss</b> <small>(Total Revenue minus Total Project/Event Budget) :</small>	<b>\$</b>	<b>(14,250)</b>

2025 Financial Statement					
<b>INDIVIDUAL CONTRIBUTIONS</b>				<b>Total</b>	
	<b>Grants</b>	<b>\$31,000</b>			
	<b>Net Assets</b>	<b>\$3,876</b>			
	<b>Donations</b>	<b>\$500</b>			
	<b>Total Support &amp; Revenue</b>	<b>\$35,376</b>			
<b>EVENTS/FUNDRAISERS</b>		<b>EXPENSE</b>	<b>REVENUE</b>		
	<b>Juneteenth</b>	<b>\$27,643</b>	<b>\$0</b>		
	<b>MLK Weekend Celebration</b>	<b>\$250</b>	<b>\$300</b>		
	<b>Total Expense &amp; Revenue</b>	<b>\$27,893</b>	<b>\$300</b>		
<b>PROGRAMS</b>					
		<b>EXPENSE</b>	<b>REVENUE</b>		
	<b>HBCU SC College Tour</b>	<b>\$5,800</b>	<b>\$6,000</b>		
	<b>Senior Citizen Meal Progam</b>	<b>\$600</b>	<b>\$0</b>		
	<b>MLK Soup Kitchen</b>	<b>\$500</b>	<b>0</b>		
<b>EXPENSE</b>	<b>Personnel</b>	<b>\$0</b>			
	<b>Program Related Materials</b>	<b>\$0</b>			
	<b>Marketing</b>	<b>\$500</b>			
<b>Change In Net Assets</b>		<b>\$35,293</b>	<b>\$6,300</b>	<b>\$7,483</b>	Balance Forward



## MLK Meeting Minutes

11/12/25 Meeting commenced at 6:00pm

Present: Jacquelyn Brown, Benisha Brown, Aaron Jenkins, Wanda Johnson, Selena Chisolm, Marcia Frazier

Motion to adopt the agenda was made by Wanda Johnson and second by Aaron Jenkins, vote was placed on the floor and unanimous consensus to approve the agenda was recorded.

Motion to approve the minutes from October's meeting was made by Selena Chisolm Brown and second by Aaron Jenkins, vote was placed on the floor and unanimous consensus to approve the agenda was recorded.

## Old Business

- I. 2025 MLK Weekend Celebration
  - a. Memorial Celebration/Peace Walk/Community Picnic
    - i. Correspondence to local churches has been sent and awaiting participation confirmation. Monday youth participants will include area churches and youth groups. Bluffton JROTC will act as parade marshals again this year. Community picnic needs confirmation from participating restaurants and caterers to donate food to offer hot lunches to the community. Aaron will spearhead youth participants, Selena will coordinate picnic participants.

## New Business

1. 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. Ma Daisy's Porch 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; Beth Inabinett & For the Funk of It will headline Friday's event, CJ The DJ will headline Saturday's event and

The Nate Myers IV will headline Sunday's event. Lineup for the remainder of the weekend will be confirmed later.

The meeting was adjourned at 8:10pm

EVENT HOSTING	<u>Memo</u>	<u>Debit</u>	<u>Vendor</u>	<u>ATAC Reimbursement Amt</u>
	<b>COGS - Customer Events</b>			
	Juneteenth restroom rental	1,906.84	Royal Restrooms	1,906.84
	Juneteenth transportation	1,000.00	Bluffton Breeze	1,000.00
	advertising - Juneteenth	5,785.00	iHeart Radio	8,047
	Entertainment, Stage and Production - Juneteenth Fest Saturday	5,500.00	Swampfire Records LLC	\$5,500
	Stage and sound for Juneteenth Rodeo Event	1,500.00		
	Stage and sound for Black Food Truck Friday Event	1,400.00	Scrap Entertainment	\$1,400.00
	Rentals for Juneteenth Black Food Truck Friday Event	1,405.80	Beatriz Event Rentals	\$1,405.80
	Ad & mktg- Juneteenth	926.73	Facebook/Instagram	703.88
	Dumpster Trailer	350.00	Proactive Security Professionals	3,780.00
	Bouncee Houses Saturday	950.00	Cleven Entertainment	1500
	Brunch Balloon Arch	750.00		25,243.88
	Event Decor	2,500.00		
	Brunch Dessert/Champagne Bar	800.00		
	Catering Brunch	3,550.00		
	Jazz Saxophonist Brunch Event	800.00		
	Black Food Fridays DJ	1,100.00		
	Juneteenth Rodeo DJ Cleve	2,500.00		
	Juneteenth Rodeo Entertainment (TNT Steppaz, Q)	2,100.00		
	Juneteenth Rodeo Stage & Sound Set-up	2,500.00		
	ABL Permit	25.00		
	Retail License	50.00		
	Beer & Wine Purchase Black Food Friday	650.00		
	Juneteenth Festival CJ the DJ	750.00		
	Juneenth Band "Be The Light"	525.00		
	Juneteenth Drum Circle	400.00		
	Juneteenth Gospel Performance	400.00		
	Photography	3,025.00		
	Nate Myers	800.00		
	Musical Performance Anthem	140.00		
	Videography	1,500.00		
	360 Photo Booth	1,150.00		
	Event Staff	450.00		

Volunteer Shirts	125.00	
Misceallneous (Stakes, caution tape, wristbands, markers, lights)	<u>600.00</u>	
Total - Customer Events	<u>47,914.37</u>	
Total - EVENT HOSTING	<u>47,914.37</u>	
	<u>47,914.37</u>	50,487.76

Category

- Sanitation
- Transportation
- Advertising
- Event Production
  
- Event Production
- Event Production
- Advertising
- Security
- Stage/Sound



2024 ATAC Itemized Expenses - Reimbursement Request

MEMO	Debit	Vendor	ATAC Reimbursement Amt	Category
<b>EVENT HOSTING</b>				
<b>COGS - Customer Events</b>				
Juneteenth restroom rental	1,867.15	Royal Sanitation	1,867.15	Sanitation
Juneteenth transportation	480.00	Bluffton Breeze	480.00	Transportation
advertising - Juneteenth	5,785.00	iHeart Radio	5,785	Advertising
Entertainment, Stage and Production - Juneteenth Fest Saturday	5,000.00	Swampfire Records LLC	\$5,000	Event Production
Stage and sound for Black Food Truck Friday Event	1,400.00	Scrap Entertainment	\$1,400.00	Event Production
Rentals for Juneteenth Black Food Truck Friday Event	1,405.80	Beatriz Event Rentals	\$1,405.80	Event Production
Ad & mktg- Juneteenth	926.73	Facebook/Instagram	926.73	Advertising
Dumpster Trailer	350.00	Evans Construction LLC	350.00	Sanitation
Bouncee Houses Saturday	950.00	Proactive Security Professionals	1,072.50	Security
Brunch Balloon Arch	750.00			
Event Decor	2,500.00			
Brunch Dessert/Champagne Bar	800.00			
Catering Brunch	3,550.00			
Gospel Band Juneteenth Festival	1,200.00			
Black Food Fridays DJ	1,100.00			
ABL Permit	25.00			
Retail License	50.00			
Beer & Wine Purchase Black Food Friday	650.00			
Juneteenth Festival CJ the DJ	750.00			
Photography	3,025.00			
Luv Soundz	2,500.00			
Musical Performance Anthem	50.00			
Videography	1,500.00			
360 Photo Booth	900.00			
Event Staff	450.00			
Volunteer Shirts	125.00			
Misceallneous (Stakes, caution tape, wristbands, markers, lights)	600.00			
<b>Total - Customer Events</b>	<b><u>38,689.68</u></b>			
<b>Total - EVENT HOSTING</b>	<b><u>38,689.68</u></b>		<b>18,287.18</b>	
	<b><u>38,689.68</u></b>			

TOWN OF BLUFFTON ATAX GRANT APPLICATION SCORING SHEET

Entity: **Bluffton MLK Observance Committee** Project: **11th Annual Juneteenth Celebration** Project Type: **Event/Festival**

Scoring Category	Points Possible	Points Awarded
<b>ADVERTISING</b>	<b>15</b>	
<b>Part 1: Five (5) points possible. Based on how much of the requested funds go toward advertising.</b>		
0% of funds go toward advertising	0 points	
1% - 20% of funds go toward advertising	1 point	
21% - 40% of funds go toward advertising	2 points	
41% - 60% of funds go toward advertising	3 points	
61% - 80% of funds go toward advertising	4 points	
81% - 100% of funds go toward advertising	5 points	
<b>Part 2: Ten (10) points possible. Based on where the advertising is placed.</b>		
None of the funds go toward advertising	0 points	
Local newspapers/periodicals and electronic advertising (ex. Island Packet, The Bluffton Sun)	2 points	
Local guides/periodicals specifically geared toward tourists with a shelf life of more than 30 days	4 points	
Larger regional publications and electronic marketing within 100 miles (ex. Charleston or Savannah news outlets)	6 points	
Newspapers/periodicals/electronic marketing to large, metropolitan areas outside of 100 miles away (ex. Atlanta, Charlotte, Washington, D.C., Chicago)	8 points	
Nationally distributed newspapers/periodicals/electronic marketing (ex. USA Today, NY Times, Southern Living Magazine)	10 points	
<b>TOURIST FACILITIES</b>	<b>15</b>	
Higher point value given based on anticipated ratio of tourists to locals		
<b>FESTIVAL/EVENT</b>	<b>5</b>	
Higher point value given to requests for festivals or events		
Length of event/festival should be considered. Is it an all-day event versus a two-hour event? Multi-day event?		
<b>BLUFFTON EVENT</b>	<b>5</b>	
Higher point value given to events held within the town limits of Bluffton and/or spanning multiple locations		
<b>TOURISM DRAW</b>	<b>5</b>	
0% of attendees are tourists based on historical or projected information	0 points	
1% - 20% of attendees are tourists based on historical or projected info	1 point	
21% - 40% of attendees are tourists based on historical or projected info	2 points	
41% - 60% of attendees are tourists based on historical or projected info	3 points	
61% - 80% of attendees are tourists based on historical or projected info	4 points	
81% - 100% of attendees are tourists based on historical or projected info	5 points	
<b>BENEFIT TO TOURISM (LOCAL ECONOMY)</b>	<b>5</b>	
Higher point value given to events that encourage overnight stays and/or have local business participation		
<b>SELF SUFFICIENCY</b>	<b>5</b>	
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	
<b>MISCELLANEOUS</b>	<b>10</b>	
Only use if applicant does not qualify as a festival/event		
<b>Group Average Point Total (out of a possible 40 points)</b>		<b>0</b>
<b>Group Average Percentage</b>		



**ACCOMMODATIONS TAX ADVISORY COMMITTEE  
STAFF REPORT  
Department of Finance & Administration**

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

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

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

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

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

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

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

**Budgeted Expenses Summary:**

Operating Expenses:

Total budget: \$218,900\*\*

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

Other/Ineligible Project Expenses:

Total budget: \$499,663\*\*

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

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

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

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

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

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

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

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

Accommodations Tax Committee Recommendations and Comments:  
none

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

**Bullock, Jeremy**

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

**WARNING!**  
This email originated from outside of the Town of Bluffton's email system. DO NOT click any links or open any attachments unless you recognize the sender and know the content is safe.

## Accommodations Tax Grant Application

### TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

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## TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

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

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

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(Section Break)

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Application Date 3/31/2026

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Project Name Heyward House Museum

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Project/Event Location 70 Boundary Street

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Is this a new project or event? No

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Project/Event Start Date: 7/1/2026

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Project/Event End Date 6/30/2027

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Multi-Year Project/Event? Yes

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

**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

Organization Primary Point of Contact

First Name	Nicki
Last Name	Graziani
Title	Operations Manager
Phone Number	8437576293
E-mail Address	<a href="mailto:nicki@historicbluffton.org">nicki@historicbluffton.org</a>

(Section Break)

Organization Secondary Point of Contact

First Name	Jen
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Last Name	Sommerville
Title	Board Chair
Phone Number	7602777716
E-mail Address	<a href="mailto:jenhbf@gmail.com">jenhbf@gmail.com</a>

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**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

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

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

1. Restoration of the dining room wall

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

6. Mosquito prevention system

Still to do

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

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

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

landmark museum and promoting preservation.

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

n/a

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

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

Planned Advertising and Marketing Strategies:

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

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

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

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

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

Impact on or Benefit to Tourism:

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

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

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

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

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Additional Comments: *Field not completed.*

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## TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION

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### FINANCIAL INFORMATION

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

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

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

---

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

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

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Financial Guarantee [HBF LH ATAX acceptance - JLS signed.pdf](#)

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

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

---

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

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(Section Break)

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

---

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

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**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

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**PRIOR RECIPIENT'S REPORT**

If your organization has received ATAX funding from the Town of Bluffton in previous years, you must complete the below information.

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

---

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

Additional Application Documents *Field not completed.*

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Additional Application Documents *Field not completed.*

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Additional Comments *Field not completed.*

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**TOWN OF BLUFFTON ACCOMMODATIONS TAX GRANT APPLICATION**

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

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

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

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

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

---

Signature Nicki E Graziani

---

Signatory's Title or Position                      Operations manager

---

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



Internal Revenue Service  
District Director

Department of the Treasury

Date: LG FEB 24 1982

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

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

Oct. '81 -

FIN 580015849

Dear Applicant:

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

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

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

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

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

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

(over)

Letter 1045(DO) (6-77)

0021 0002

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

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

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

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

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

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

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

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

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

Sincerely yours,

  
District Director

Letter 1045(DO) (6-77)

0021 0003

# TOWN OF BLUFFTON

## TOWN OF BLUFFTON -

### Expires:04/30/2025

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

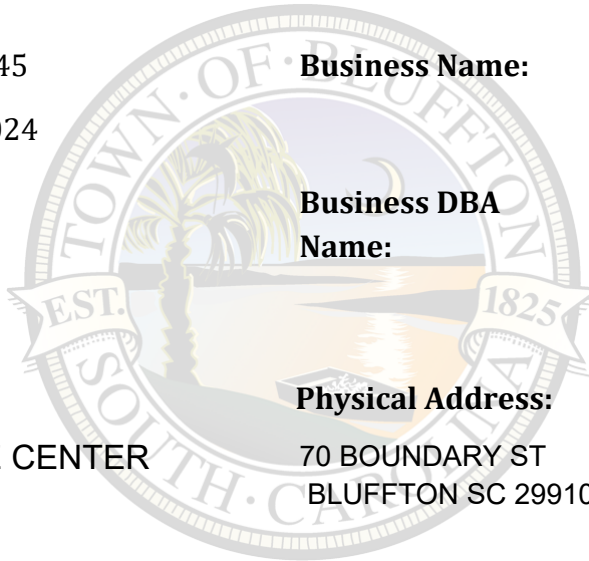
**NAICS Title:** Museums

**Business Type:**  
BLUFFTON WELCOME CENTER

**Business Name:** Bluffton Historic Preservation Society, Inc

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

**Physical Address:**  
70 BOUNDARY ST  
BLUFFTON SC 29910



**NON-TRANSFERABLE | TO BE PLACED IN A CONSPICUOUS PLACE**

#### Section 6-21 Purpose and Duration of Business License

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

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

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

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

**REVENUES**

**Revenues - Cash**

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

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

**EXPENSES**

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

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

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

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

**EXPENSES**

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

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

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

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

**EXPENSES**

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

**Other/Ineligible Expenses**

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

<b>Item</b>		<b>Amount</b>
Heyward House Museum CApital Improvements	\$	171614
Professional Development+Salaries/Payroll	\$	167062
Bank Charges	\$	6487
Rental/Permit fees (non-public events)	\$	2000
Caldwell Archives	\$	2000
Construction/Renovations/Preservation	\$	150500
_____	\$	
_____	\$	
_____	\$	
_____	\$	
_____	\$	
_____	\$	
_____	\$	
_____	\$	
<b>Total of Other/Ineligible Expenses:</b>	<b>\$</b>	<b>499663</b>
 <b>Total Project/Event Budget</b> <small>(all eligible ATAX categories + Ineligible Expenses) :</small>	<b>\$</b>	<b>718563</b>
 <b>Total Project/Event Profit or Loss</b> <small>(Total Revenue minus Total Project/Event Budget) :</small>	<b>\$</b>	<b>-522463</b>

## Historic Bluffton Foundation Balance Sheet As of February 28, 2026

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

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



March 31, 2026

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

Dear sir or madam,

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

Best regards,

A handwritten signature in black ink that reads "Jennifer Sommerville". The signature is fluid and cursive.

Jennifer Sommerville  
Board Chair  
Historic Bluffton Foundation

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

PO Box 742    70 Boundary Street    Bluffton, SC 29910    843-757-6293    [historicblufftonsc.com](http://historicblufftonsc.com)

## Historic Bluffton Foundation Balance Sheet As of February 28, 2026

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

Historic Bluffton Foundation Profit and Loss Previous Year Comparison For the Twelve Month Period Ending June, 2024 Operating A/F/D

Section X. Item #6.

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

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

interest on SC Parks money \$20660.82

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

includes engineering fees

NOTES:

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

TOWN OF BLUFFTON ATAX GRANT APPLICATION SCORING SHEET

Entity: **Historic Bluffton Foundation**

Project: **FY2027 Heyward House Museum Operations**

Project Type: **Operations**

Scoring Category	Points Possible	Points Awarded
<b>ADVERTISING</b>	<b>15</b>	
<b>Part 1: Five (5) points possible. Based on how much of the requested funds go toward advertising.</b>		
0% of funds go toward advertising	0 points	
1% - 20% of funds go toward advertising	1 point	
21% - 40% of funds go toward advertising	2 points	
41% - 60% of funds go toward advertising	3 points	
61% - 80% of funds go toward advertising	4 points	
81% - 100% of funds go toward advertising	5 points	
<b>Part 2: Ten (10) points possible. Based on where the advertising is placed.</b>		
None of the funds go toward advertising	0 points	
Local newspapers/periodicals and electronic advertising (ex. Island Packet, The Bluffton Sun)	2 points	
Local guides/periodicals specifically geared toward tourists with a shelf life of more than 30 days	4 points	
Larger regional publications and electronic marketing within 100 miles (ex. Charleston or Savannah news outlets)	6 points	
Newspapers/periodicals/electronic marketing to large, metropolitan areas outside of 100 miles away (ex. Atlanta, Charlotte, Washington, D.C., Chicago)	8 points	
Nationally distributed newspapers/periodicals/electronic marketing (ex. USA Today, NY Times, Southern Living Magazine)	10 points	
<b>TOURIST FACILITIES</b>	<b>15</b>	
Higher point value given based on anticipated ratio of tourists to locals		
<b>FESTIVAL/EVENT</b>	<b>5</b>	
Higher point value given to requests for festivals or events		
Length of event/festival should be considered. Is it an all-day event versus a two-hour event? Multi-day event?		
<b>BLUFFTON EVENT</b>	<b>5</b>	
Higher point value given to events held within the town limits of Bluffton and/or spanning multiple locations		
<b>TOURISM DRAW</b>	<b>5</b>	
0% of attendees are tourists based on historical or projected information	0 points	
1% - 20% of attendees are tourists based on historical or projected info	1 point	
21% - 40% of attendees are tourists based on historical or projected info	2 points	
41% - 60% of attendees are tourists based on historical or projected info	3 points	
61% - 80% of attendees are tourists based on historical or projected info	4 points	
81% - 100% of attendees are tourists based on historical or projected info	5 points	
<b>BENEFIT TO TOURISM (LOCAL ECONOMY)</b>	<b>5</b>	
Higher point value given to events that encourage overnight stays and/or have local business participation		
<b>SELF SUFFICIENCY</b>	<b>5</b>	
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	
<b>MISCELLANEOUS</b>	<b>10</b>	
Only use if applicant does not qualify as a festival/event		
<b>Group Average Point Total (out of a possible 40 points)</b>		<b>0</b>
<b>Group Average Percentage</b>		

Grant Requests	Amount Requested	Advisory Committee Recommendation	Town Council Approved	Paid FY 2025	Paid FY 2026	Lapsed	Remaining
<b>Applications Received April 1, 2024</b>							
Society of Bluffton Artists: 30th Anniversary	\$ 20,000	\$ 20,000	\$ 20,000	\$ 13,271		\$ 1,259.19	-
Hilton Head Symphony Orchestra: 2024 Bluffton Concerts	\$ 43,632	\$ 43,632	\$ 43,632	\$ 39,894		\$ 3,737.87	-
BlaCQuity: 2024 River and Roots Festival	\$ 25,000	\$ 25,000	\$ 25,000	\$ 22,733		\$ 2,266.97	-
MLK Observance Committee: 9th Annual Bluffton Juneteenth Festival Weekend	\$ 20,000	\$ 20,000	\$ 20,000			\$ 3,091.68	-
HBF: Heyward House Welcome Center Q1 Allocation	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000		-	-
HBF: Luke Peoples Music Celebration	\$ 5,000	\$ -	\$ -			-	-
<b>Total Grants for 3rd Quarter Collections</b>	<b>\$ 153,632</b>	<b>\$ 148,632</b>	<b>\$ 148,632</b>	<b>\$ 115,898</b>	<b>\$ -</b>	<b>\$ 10,355.71</b>	<b>\$ -</b>
<b>Applications Received July 1, 2024</b>							
HBF: Heyward House Welcome Center Q2 Allocation	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000.00		\$ -	\$ -
HBF: Luke Peoples Music Celebration	\$ 5,000	\$ 3,200	\$ 3,200	\$ 1,551.00		\$ 1,649.00	-
Historic Bluffton Arts & Seafood Festival: 2024 Arts & Seafood	\$ 80,000	\$ 80,000	\$ 80,000	\$ 80,000.00		-	-
Coastal Conservation Association: 2024 Conservation Weekend in Bluffton	\$ 10,000	\$ 10,000	\$ 10,000	\$ 9,259.13		\$ 740.87	-
Boys & Girls Club of the Lowcountry: 2024 Bike Bluffton	\$ 23,500	\$ 23,500	\$ 23,500	\$ 14,849.96		\$ 8,650.04	-
<b>Total Grants for 4th Quarter Collections</b>	<b>\$ 158,500</b>	<b>\$ 156,700</b>	<b>\$ 156,700</b>	<b>\$ 145,660.09</b>	<b>\$ -</b>	<b>\$ 11,039.91</b>	<b>\$ -</b>
<b>Applications Received October 4, 2024</b>							
Farmer's Market of Bluffton: 2025 Expenses	\$ 55,300	\$ 55,300	\$ 55,300	\$ 15,954.48	\$ 19,062.96	\$ 20,282.56	\$ -
The New Bluffton Worship: 2024 Christmas Eve Under the Stars	\$ 28,810	\$ 25,100	\$ 25,100	\$ 11,358.84		\$ 13,741.16	-
Society of Bluffton Artists: Partial CY2025 Expenses - Marketing	\$ 27,000	\$ 27,000	\$ 27,000	\$ 17,526.29	\$ 5,794.59	\$ 3,679.12	-
Congregation Beth Yam: 2024 Hanukkah Celebration	\$ 2,980	\$ 2,830	\$ 2,830	\$ 1,000.00		\$ 1,830.00	-
Historic Bluffton Foundation: Heyward House Museum Operations - Q3 FY2025	\$ 40,000	\$ 40,000	\$ 20,000	\$ 20,000.00		-	-
May River Theatre: 2025 Performance Season Advertising & Royalties	\$ 42,826	\$ 42,826	\$ 42,826	\$ 31,656.79	\$ 8,169.14	\$ 3,000.07	-
<b>Total Grants for 1st Quarter Collections</b>	<b>\$ 196,916</b>	<b>\$ 193,056</b>	<b>\$ 173,056</b>	<b>\$ 97,496.40</b>	<b>\$ 33,026.69</b>	<b>\$ 42,532.91</b>	<b>\$ -</b>
<b>Applications Received December 31, 2024</b>							
The Rotary Club of Bluffton: 2025 Mayfest Marketing & Transportation	\$ 24,000	\$ 24,000	\$ 24,000	\$ -	\$ 14,944.74	\$ 9,055.26	\$ -
Historic Bluffton Foundation: Heyward House Museum Operations - Q4 FY2025	\$ 40,000	n/a	n/a				
Historic Bluffton Foundation: Spring Tour of Homes	\$ 3,000	n/a	n/a				
<b>Total Grants for 2nd Quarter Collections</b>	<b>\$ 67,000</b>	<b>\$ 24,000</b>	<b>\$ 24,000</b>	<b>\$ -</b>	<b>\$ 14,944.74</b>	<b>\$ 9,055.26</b>	<b>\$ -</b>
<b>Applications Received March 31, 2025</b>							
Michael C. Riley High School Alumni Association: Project Face-Lift (Phase III)	\$ 20,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Hilton Head Symphony Orchestra: 2025 Bluffton Concerts	\$ 48,781	\$ 48,781	\$ 48,781	-	\$ 39,499.07	\$ 9,281.93	-
Historic Bluffton Foundation: FY2026 Heyward House Museum Operations	\$ 50,000	\$ 50,000	\$ 50,000	-	-	-	\$ 50,000.00
Town of Bluffton: Sarah Riley Hooks Cottage Restoration	\$ 257,304	\$ 257,304	\$ 257,304	-	-	-	\$ 257,304.00
BlaCQuity SC: Roots & Rivers Festival 2025	\$ 27,000	\$ 27,000	\$ 27,000	-	\$ 15,735.82	\$ 11,264.18	-
The Bluffton MLK Observance Committee: 10th Annual Bluffton Juneteenth Festival	\$ 23,000	\$ 23,000	\$ 23,000	-	\$ 17,166.63	\$ 5,833.37	-
<b>Total Grants for 3rd Quarter Collections</b>	<b>\$ 426,085</b>	<b>\$ 406,085</b>	<b>\$ 406,085</b>	<b>\$ -</b>	<b>\$ 72,401.52</b>	<b>\$ 26,379.48</b>	<b>\$ 307,304.00</b>
<b>Applications Received June 30, 2025</b>							
Michael C. Riley High School Alumni Association: Project Face-Lift (Phase III)	\$ 20,000	\$ 20,000	\$ 20,000	\$ -	\$ 20,000.00	\$ -	\$ -
Coastal Conservation Association for 2025 Conservation Weekend in Bluffton	\$ 10,000	\$ 10,000	\$ 10,000	\$ -	\$ 10,000.00	\$ -	\$ -
SOBA: FY2026 Marketing Expenses	\$ 40,000	\$ 40,000	\$ 40,000	\$ -	\$ 16,721.38	\$ -	\$ 23,278.62
Arts & Seafood for 2025 Event	\$ 80,000	\$ 80,000	\$ 80,000	\$ -	\$ 80,000.00	\$ -	\$ -
Campbell Chapel Church: Additional Phases of Restoration Project	\$ 109,000	\$ 109,000	\$ 109,000	\$ -	\$ 49,527.06	\$ -	\$ 59,472.94
Campbell Chapel AME Church: SC Conference of AME Church	\$ 10,000	\$ 10,000	\$ 10,000	\$ -	\$ 8,273.71	\$ 1,726.29	\$ -
Historic Bluffton Foundation: Fall Tour of Homes	\$ 6,500	\$ 6,500	\$ 6,500	\$ -	\$ 2,211.15	\$ 4,288.85	\$ -
<b>Total Grants for 4th Quarter Collections</b>	<b>\$ 275,500</b>	<b>\$ 275,500</b>	<b>\$ 275,500</b>	<b>\$ -</b>	<b>\$ 186,733.30</b>	<b>\$ 6,015.14</b>	<b>\$ 82,751.56</b>
<b>Applications Received September 30, 2025</b>							
Hilton Head Choral Society: 2026 Vienna Boys Choir Concerts in Bluffton	\$ 10,000	\$ 10,000	\$ 10,000	\$ -	\$ 10,000.00	\$ -	\$ -
The New Bluffton Worship: 2025 Christmas Eve Under the Stars	\$ 11,500	\$ 11,500	\$ 11,500	\$ -	\$ 9,359.87	\$ 2,140.13	\$ -
Congregation Beth Yam: 2025 Hanukkah Celebration	\$ 7,770.25	\$ 7,770.25	\$ 7,770.25	\$ -	\$ 4,489.10	\$ 3,281.15	\$ -
Farmer's Market of Bluffton: 2026 Expenses	\$ 66,500	\$ 66,500	\$ 66,500	\$ -	\$ 9,628.66	\$ -	\$ 56,871.34
May River Theatre: 2026 Performance Season Advertising & Royalties	\$ 49,764	\$ 49,764	\$ 49,764	\$ -	\$ 18,969.70	\$ -	\$ 30,794.30
<b>Total Grants for 1st Quarter Collections</b>	<b>\$ 145,534</b>	<b>\$ 145,534</b>	<b>\$ 145,534</b>	<b>\$ -</b>	<b>\$ 52,447.33</b>	<b>\$ 5,421.28</b>	<b>\$ 87,665.64</b>
<b>Applications Received December 31, 2025</b>							
The Rotary Club of Bluffton: 2026 Mayfest	\$ 25,000	\$ 25,000	\$ 25,000	\$ -	\$ -	\$ -	\$ 25,000.00
Bluffton Gullah Cultural & Heritage Center: Deer Tongue Building Renovations	\$ 175,000	n/a	n/a	\$ -	\$ -	\$ -	\$ -
Beaufort Water Search and Rescue	\$ 20,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Grants for 2nd Quarter Collections</b>	<b>\$ 220,000</b>	<b>\$ 25,000</b>	<b>\$ 25,000</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 25,000.00</b>
<b>Applications Received March 31, 2026</b>							
The Farmer's Market: Supplemental Facility Support	\$ 9,375	\$ 9,375	\$ -	\$ -	\$ -	\$ -	\$ -
Hilton Head Syphony Orchestra: 2026 Bluffton Concerts	\$ 46,818	\$ 46,818	\$ -	\$ -	\$ -	\$ -	\$ -
Beaufort Water Search & Rescue: Purchase of Replacement Boat	\$ 21,875	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Beaufort Water Search & Rescue: FY2026 BWSAR Marketing Campaign	\$ 7,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Bluffton MLK Observance Committee: 11th Annual Juneteenth Celebration	\$ 20,000	\$ 20,000	\$ -	\$ -	\$ -	\$ -	\$ -
Historic Bluffton Foundation: FY2027 Heyward House Museum Operations	\$ 50,000	\$ 50,000	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Grants for 3rd Quarter Collections</b>	<b>\$ 155,568</b>	<b>\$ 126,193</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Total Grants</b>	<b>\$ 3,676,068</b>	<b>\$ 3,183,560</b>	<b>\$ 2,858,493</b>	<b>\$ 506,064.51</b>	<b>\$ 399,636.38</b>	<b>\$ 251,199.20</b>	<b>\$ 502,721.20</b>

TOWN COUNCIL



STAFF REPORT  
Projects and Watershed Resilience Department

<b>MEETING DATE:</b>	June 9, 2026
<b>PROJECT:</b>	Approval to Authorize a Construction Contract with Nix Construction Co., Inc. for the New Riverside Barn Park Disc Golf Course (Fiscal Impact \$229,385.03)
<b>PROJECT MANAGER:</b>	Patrick Rooney, Capital Improvement Program Manager

**REQUEST:** Town Staff requests Town Council to authorize the Town Manager to execute a Contract (Attachment 1) with Nix Construction Company, Inc. for \$208,531.85 to construction a Disc Golf Course at the New Riverside Barn Park. Additionally, staff requests a 10% contingency of \$20,853.18 to cover any unforeseen changes that may arise during construction.

The total fiscal impact with contingency is \$229,385.03 and is within the approved budget as illustrated on the attached Project Data Sheet (Attachment 2).

**BACKGROUND:** To meet the growing demand for disc golf in the area, the New Riverside Barn Park Disc Golf Course project was added to the Capital Improvements Program in FY26. Final Design of the Disc Golf Course began in September 2025 with the local landscape architectural firm of Wood and Partners in conjunction with Aceplace Design, a disc golf consultant located in Rock Hill, SC.

The 18-hole course begins at the large event lawn area, south of Hwy 46/170 and meanders through the wooded, undeveloped area on the western side of the New Riverside Barn Park (Attachment 3). The course is designed for all levels of players, from beginners to intermediate levels, and fun for all ages and skill sets. The course routing was designed to minimize site disturbance and to retain all significant trees. Selective under-brushing for the fairways was completed by our Public Services staff in preparation for construction of the disc course.

The scope of the project includes:

- General site cleanup, selective tree pruning and limbing up for fairway clearances
- Grading and mulching of the fairways
- Construction of 18 - 4'x8' concrete pads as tee boxes
- Installation of 19-disc golf baskets
- Fence modifications and bollard at pedestrian opening at tree line
- Two-rail fencing at hazard areas (By Public Services)

- Disc Golf Signage (course layout, tee box signs, hazard signs such as “Beware of Alligators,” etc.)
- Site furnishings (benches, trash receptacles, AED – installed by Public Services)
- Buffer/Screen Plantings (installed by Public Services)

The bidding process was performed in accordance with the Town’s Purchasing Ordinance including a formal Invitation for Bid (IFB), public bid opening and bid review by Staff. Two bids were received on 5/13/2026, and both bids exceeded \$306k and project budget parameters. Therefore, Staff negotiated with the low bidder (Nix Construction Co., Inc.) to value engineer the project to reduce costs and omit work or materials that would not impact the quality of the project or could be better supplied by Town Public Services at a lower cost. Value Engineering items to reduce costs included the following:

- Redesigned disc golf course layout to eliminate hardscape features (i.e. Retaining walls, timber steps, and handrails for elevated tees)
- Reduced contractor fee and eliminated engineering fee
- Site Furnishings, two-rail fence, and buffer plantings installed by Public Services

**NEXT STEPS:** Upon approval of the proposed contract, Staff will initiate a pre-construction meeting and plans to commence construction in July 2026. The construction duration is expected to be 120 days, subject to favorable conditions and material availability.

**SUMMARY:** This project originated with the adoption of the FY2025-2026 Strategic Plan, FY26 Consolidated Budget and is supportive of the following **Strategic Focus Areas and Guiding Principles:**

- **Community Quality of Life – Guiding Principle #4:** Foster and support place-based initiatives and evaluate community policies, programs, and gathering places, and events that promote healthy and quality lifestyles for our diverse citizenry
- **Infrastructure – Guiding Principle #3:** Establish long-term planning, prioritization and investments strategies for future infrastructure and facilities that improve the quality of life for citizens while being financially sustainable.

Consistent with these Guiding Principles, Staff requests Town Council to authorize the Town Manager to execute a proposed contract with Nix Construction Co., Inc.

**ATTACHMENTS:**

1. Draft Contract
2. Project Data Sheet
3. Disc Golf Concept Plan
4. Proposed Motion



STATE OF SOUTH CAROLINA )  
COUNTY OF BEAUFORT )

TOWN OF BLUFFTON AGREEMENT  
NUMBER 2026-43

**THIS AGREEMENT FOR CONTRACTOR SERVICES** (“Agreement”) is made the \_\_\_\_ of \_\_\_\_\_, 2026, (“Effective Date”) between Nix Construction Company, Inc. located at 2 Corpus Christi Place, Suite 203, Hilton Head Island, SC 29928 (hereinafter called “Contractor”) and the Town of Bluffton (hereinafter called “Town”), a municipal corporation organized and existing under the laws of the State of South Carolina; individually hereinafter “Party” and collectively the “Parties”.

**WHEREAS**, the Town desires to contract for the project identified as **New Riverside Barn Park Disc Golf** and as described in detail in the Contract Documents; hereinafter collectively referred to as the “Project”; and,

**WHEREAS**, Contractor responded to an Invitation for Bid, incorporated herein, and represented that its staff has the necessary licenses and is qualified to perform the Work and completed the Project as established in this Agreement in a professional and timely manner; and,

**WHEREAS**, the Parties have agreed to enter into this Agreement wherein the Contractor shall perform on the Scope of Work as described herein under the terms established in this Agreement.

**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 Contractor, the Parties hereto agree as follows:

**ARTICLE 1. RECITALS and INCORPORATION.** The Recitals set forth above, the Contract Documents attached to this Agreement, and all exhibits are incorporated herein by reference as if set forth in their entirety herein.

**ARTICLE 2. SCOPE OF WORK.**

2.1 Contractor shall perform the Work as specified or indicated in the Contract Documents.

**ARTICLE 3. ENGINEER.**

3.1 The Project has been designed by Wood + Partners, a licensed landscape architect with the knowledge and qualifications necessary for the Project.

**ARTICLE 4. CONTRACT TIME.**

4.1 The Contract Time shall be **one hundred and twenty** consecutive calendar days from the commencement date as defined in the Notice to Proceed (“NTP”) to fully complete the Work herein contemplated.

4.2 Contractor agrees that the Work shall proceed at such rate of progress as will ensure full completion thereof within the Contract Time stated herein and pursuant to the terms and conditions set forth in the Contract Documents and in this Agreement. It is expressly understood and agreed by the Parties that the Contract Time is reasonable for the completion of the Work and that time is of the essence.

4.3 If Contractor is delayed in the progress of the Work due to circumstances including changes in the Work requested by the Town, by any separate contractor employed by the Town, or by labor disputes, severe weather, unavoidable casualties or other force majeure conditions beyond the Contractor’s control, avoidance or mitigation, and without the fault or negligence of the Contractor, then the Contract Time may be extended by a mutually signed Change Order in accordance with Article 6.

**ARTICLE 5. CONTRACT PRICE.**

5.1 Town will pay Contractor for performance of the Work in accordance with Contract Documents at the contract price agreed upon on the bid form attached to this Agreement which is not to exceed **Two Hundred and Eight Thousand, Five Hundred Thirty-One and 85/100 (\$208,531.85) Dollars** unless written approval is authorized by the Town.

ARTICLE 6. CHANGE ORDERS.

6.1 Changes to the scope of Work, changes to the Contract Time, or changes to the Contract Price necessitate a written Change Order signed by both Parties. No changes in the Work shall be done without a mutually signed Change Order.

6.2 Change Orders to extend the Contract Time must meet the criteria in Article 4. Contractor must request an extension to the Contract Time via written Change Order containing a detailed explanation for the request to extend the Contract Time and provided with adequate notice to the Town.

6.3 Contractor may submit Change Orders for additional Costs if additional scope is requested by the Town or if it is related to an extension of time requested in 6.1. Change orders for scope which should rightfully be covered by Contractor’s contingency will not be permitted.

ARTICLE 7. APPLICATIONS FOR PAYMENT

7.1 Contractor shall send invoices via email simultaneously to [invoice@townofbluffton.com](mailto:invoice@townofbluffton.com) and to the project’s assigned Town Project Manager. Invoices may also be sent to the Town of Bluffton, PO Box 386 Bluffton, SC 29910, Attn: Accounts Payable if emailing is not possible. The invoice should reference the contract number. Approved invoices shall be paid within thirty (30) calendar days upon receipt of the invoice in the Town Finance Department.

7.2 All progress payments shall be made on the basis of the progress of the Work. Town may consult with Project Engineer to validate that the progress represented on the Contractor invoice is accurately represented prior to payment.

7.3 There shall be a ten percent (10%) retainage withheld from each progress payment until the Contractor has achieved seventy-five percent (75%) completion of the Work by dollar value based on the Contract Price. At the option of the Town, the retainage will be reduced to five percent (5%) plus a reasonable amount for defective or non-conforming work and anticipated liquidated damages.

7.4 Upon final inspection and written acceptance of the Work, the Town will pay the remainder of the Contract Price.

ARTICLE 8. LIQUIDATED DAMAGES

8.1 There is no liquidated damages provision for this Agreement.

8.2 RESERVED.

ARTICLE 9. ASSURANCE

9.1 Contractor has familiarized itself with the nature and extent of the Contract Documents, Work, locality, and with all local conditions, and Federal, State and local laws, ordinances, rules and regulations that in any manner may affect cost, progress, or performance of the Work. Contractor agrees to adhere to all applicable laws, ordinances, rules and regulations associated with the Work and the terms and condition of this Agreement.

9.2 Contractor has studied carefully all reports of investigations and tests of subsurface and latent physical conditions at the site, as applicable, or otherwise affecting costs, progress, or performance of the Work that were relied upon by Engineer in the preparation of the Drawings and Specifications and which have been identified in Contract Documents. Failure of Contractor to include costs in its bid as a result of any investigation or test shall not result in an increase cost to the Town.

9.3 Contractor has made or caused to be made examinations, investigations and tests and studies or such reports and related data in addition to those referenced above as Contractor deems necessary for performance of the Work at the Contract Price within the Contract Time and in accordance with the other terms and conditions of the Contract Documents; no additional examinations, investigations, tests, reports, or similar data are or will be required for such purposes.

9.4 Contractor has had the opportunity to ask questions and clarifications during the bid process, has given the Town written notice of any conflict, error or discrepancy that Contractor has discovered in the Contract Documents, and agrees that the Contract Documents are sufficient in scope and detail to indicate and convey understanding of all terms and conditions for performance of the Work.

ARTICLE 10. CONTRACT DOCUMENTS

10.1 Contractor agrees under the terms stated in the Contract Documents and at Contractor’s own proper cost and expense, to furnish all the materials, supplies, machinery, equipment, tools, superintendence, labor, insurance, bonds, and other accessories and services necessary to complete the said project in accordance with the conditions and prices stated in the Solicitation Document, Instructions to Bidders, the Agreement, the Specifications, the plans including all maps, plats, blue prints, and other drawings and printed or written explanatory matter thereof.

10.2 The Contract Documents that incorporated into this Agreement between the Parties are attached hereto and made a part hereof and consist of the following:

- 10.2.1 Solicitation Document.
- 10.2.2 Instructions to Bidders.
- 10.2.3 Bid Sheet.
- 10.2.4 Schedule.
- 10.2.5 This Agreement.
- 10.2.6 Performance and Payment Bonds.
- 10.2.7 Town of Bluffton Special Conditions.
- 10.2.9 Drawings dated 3/24/2026.
- 10.2.9 Addenda number 1 to 2, inclusive.
- 10.2.10 Any modification, including Change Orders, duly delivered after execution of the Agreement.

ARTICLE 11. WARRANTY

11.1 Contractor warrants and guarantees to Town that the Work will be in accordance with the Contract Documents and will not be defective. Contractor’s warranty excludes defects or damage caused by abuse, modification, or improper maintenance or operation by persons other than Contractor, Subcontractors, Suppliers, or any other individual or entity for whom Contractor is responsible, or normal wear and tear under normal usage.

11.2 Within one (1) year after the date of Final Acceptance, if any Work is found to be defective, or if the repair of any damages to the land or areas made available for Contractor’s use is found to be defective, Contractor shall promptly repair or correct without cost to the Town.

ARTICLE 12. CURE

12.1 If Town or the Engineer determines that the Work is defective, the Town shall provide written notice to Contractor by email or letter. Within ten (10) days of receipt of such notice, Contractor shall correct all defective Work or respond to the Town in writing with a schedule to correct all defective work. All corrections shall be at the sole expense of Contractor.

12.2 If Contractor fails to correct defective work within time specified or agreed to, the Town may seek remedy from the Contractor’s surety or by other means of correcting the defect or deficiency. Contractor will be responsible for all costs to cure, including the cost of any claims and reasonable attorney’s fees sustained by the Town in exercising its rights and remedies.

ARTICLE 13. TERMINATION

13.1 The Town shall, at its sole option and discretion, have the right to terminate this Agreement for any reason whatsoever by providing Contractor with a notice of termination. Whenever the Contractor is terminated for convenience under this clause, the Contractor shall be entitled to the actual direct costs of all labor and material expended on the job prior to the effective date of the termination plus fifteen percent (15%). In no event shall the Contractor be entitled to anticipatory profit or damages for any termination under this clause.

13.2 A Party shall be considered in default of its obligations under this Agreement if such party should fail to observe, comply with, or perform any term, condition or covenant contained in this Agreement or any Exhibit hereto.

In the event of default and failure to cure said default pursuant to Article 12, the non-defaulting party may terminate this Agreement immediately upon written notice to the defaulting party and pursue any remedies provided by law or under this Agreement.

ARTICLE 14. SUBCONTRACTORS AND ASSIGNMENT

14.1 Contractor shall provide the Town with a list of all Subcontractors and immediately notify the Town of any changes. The Town reserves the right to approve any or all Subcontractors. It is the responsibility of Contractor to ensure that all Subcontractors are appropriately licensed, including with a Town of Bluffton business license. Use of non-licensed Subcontractors may be grounds for termination.

14.2 The Contractor may not assign this Agreement without the prior written approval of the Town.

ARTICLE 15. INDEMNIFICATION

15.1 The Contractor shall defend, indemnify, and hold harmless the Town, its officers, directors, agents, and employees from and against any and all actions, costs, claims, losses, expenses, and/or damages, including attorney’s fees, whether incurred prior to the institution of litigation, during litigation, or an appeal arising out of or resulting from the conduct of any activity hereby authorized or the performance of any requirement imposed pursuant by this Agreement, however caused or occasioned, unless caused by the willful misconduct or gross negligence of the Town.

ARTICLE 16. INSURANCE

16.1 The Contractor shall maintain the appropriate amounts and coverages of insurance as identified below for the entire length of the Agreement. Except as to Worker’s Compensation and Employer’s Liability, the Contractor must provide the Town with a Certificate of Insurance for each that names the Town as an **additional insured** on their policy with the following endorsement:

*The Town of Bluffton, a municipality of the State of South Carolina, its officers, agents and employees as additional insured.*

16.2 The Contractor is required to immediately contact the Town should any change to these policies occur during the course of the performance of this Agreement. Failure to maintain these policies is grounds for termination. Coverages are:

Workers Compensation – Contractor shall maintain Worker’s Compensation Insurance & Employers Liability in accordance with the State of South Carolina Code.

Business Auto Policy – Contractor shall maintain Business Automobile Liability at a limit of liability not less than \$500,000 each occurrence for all owned, non-owned and hired automobiles.

Builder’s Risk – for construction projects, carry Builder’s Risk coverage in the amount of 5% of the total contract value.

Commercial General Liability – Commercial General Liability for public liability during the lifetime of a contract shall have minimum limits of \$1,000,000 per claim, \$2,000,000 per occurrence for Personal Injury, Bodily Injury, and Property Damage Liability. Coverage shall include Premises and/or Operations, Independent Contractors, Products and/or Complete Operations, Contractual Liability and Broad Form Property Damage Endorsements. Coverage shall not contain an exclusion or limitation endorsement for Contractual Liability or Cross Liability. Coverage for the hazards of explosion, collapse and underground property damage (XCU) must also be included when applicable to the work to be performed. All insurance policies shall be issued from a company or companies duly licensed by the State of South Carolina. Specific endorsements will be requested depending upon the type and scope of work to be performed.

ARTICLE 17. NOTICE.

17.1 Whenever notice is required or permitted under the terms of this Agreement, it shall be in writing and delivered or sent by either: (a) United States mail, certified, return receipt requested, in which case notice shall be

deemed given on the certified date of delivery or rejection of delivery, (b) by any national express delivery service which provides evidence of delivery, (c) or by electronic mail evidenced with an electronic return receipt as proof of delivery. All notices shall be addressed to the following address (or at such other address as may hereafter be substituted by notice in writing):

<i>The Contractor:</i>	<b>Nix Construction Company, Inc.</b> Attn: Aaron Thielemier, Manager 2 Corpus Christi Place, Suite 203 Hilton Head Island, SC 29928 Phone: 843-341-2330 Email: <a href="mailto:aaron@nixconstruction.com">aaron@nixconstruction.com</a>	<i>The Town:</i>	<b>Town of Bluffton</b> Attn: Stephen Steese, <i>Town Manager</i> 20 Bridge Street Bluffton, SC 29910 Phone: 843-706-4500 Email: <a href="mailto:ssteese@townofbluffton.com">ssteese@townofbluffton.com</a>
<i>With Copy to:</i>	<b>Name</b> Insert Address Phone: Email:	<i>With Copy to:</i>	Attn: Felicia Roth, <i>Director of Contracts</i> 20 Bridge Street Bluffton, SC 29910 Phone: 843.540.5723 Email: <a href="mailto:froth@townofbluffton.com">froth@townofbluffton.com</a>

**ARTICLE 19. CONFLICTING TERMS**

19.1 If any provision, term or condition of this Agreement is determined to contradict or conflict with any other provision, term or condition contained in the Contract Documents or Invitation for Bid, then the order of control is first this Agreement, then Solicitation Documents, and then drawings and specifications.

**ARTICLE 19. ADDITIONAL TERMS AND CONDITIONS**

19.1 *Deliverables.* All deliverables, whether goods, services, supplies, or other, shall become the property of the Town. Any deliverables that may be provided in hard copy and electronic form, such as drawings, plans, specifications, reports, or other, shall be provided in such formats and orientations as required by the Town.

19.2 *Time of the Essence.* Time is of the essence of this Agreement, although a request for additional time should not be unreasonably withheld when the additional time is needed by a Party to receive the approval and authority required by either local or state law and pursuant to the terms and conditions of this Agreement.

19.3 *Compliance with Laws.* Contractor shall comply with the most current Federal and State of South Carolina Laws and Regulations, including but not limited to, Fair Labor Standards Act and Occupational Safety and Health Administration guidelines.

19.4 *Severability.* Should any part of this Agreement be rendered void, invalid or unenforceable by a court of law, such a determination shall not render void, invalid or unenforceable any other part of this Agreement.

19.5 *Governing Law.* 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.

19.6 *Fees and Costs.* In the event the Town must proceed to litigation to protect or enforce its rights, the Town shall be entitled to recover its reasonable attorney fees and costs.

19.7 *Counterparts.* This Agreement may be executed in one or more counterparts, all of which taken together shall constitute one and the same instrument.

19.8 *Waiver.* No provision, condition or covenant of this Agreement shall be waived by either Party hereto except in writing, delivered to the other Party and signed by the Party consenting thereto. If the Town fails to enforce any provision of this Agreement, that failure does not waive the provision or Town’s right to enforce it.

19.9 *Successors and Assigns.* All provisions of this Agreement shall be binding on and inure to the benefit of each Party and each Party’s respective heirs, executors, legal representatives, successors, successors in title and assigns. The Parties understand and agree that Contractor may neither assign nor transfer any rights or obligations

under this Agreement without providing written notice to the Town and obtaining written approval of the assignment from the Town, where the Parties agree that said approval shall not be unreasonably withheld.

19.10 *Relationship of the Parties.* The Parties hereto intend that no master/servant, employer/employee, or principal/agent relationship will be created by the Agreement. Nothing contained herein creates any relationship between the Parties 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 the Contractor’s agents and employees and methods utilized in fulfilling its obligations hereunder shall lay solely and exclusively with the Contractor. The Contractor’s agents or employees shall not be considered employees of the Town for any purpose. No person employed by the Contractor shall have any benefits, status, or right of employment with the Town.

19.11 *Non-Discrimination.* The Parties certifies that in the performance of this Agreement, no Party will discriminate any person, client, or subcontractor on account of race, color, sex, age, religion, handicap, or national origin. It is the policy of the Town and County to comply with Title VI of the 1964 Civil Rights Act (Title VI) and its related statutes. To this end, the Town and County gives notice to all vendors or businesses that the Town and County assures full compliance with Title VI and its related statutes in all programs, activities, and contracts. It is the policy of the Town and County that no person shall be excluded from participation in, denied the benefit of, or subjected to discrimination under any of its programs, activities, or contracts based on race, color, national origin, age, sex, disability, religion, or language. Pursuant to Title VI requirements, any entity that enters into a contract or agreement with the Town including, but not limited to vendors or businesses, may not discriminate based on race, color, national origin, age, sex, disability, religion, or language.

**IN WITNESS WHEREOF**, the Parties hereto affixed their signatures hereto as of the Effective Date.

NIX CONSTRUCTION COMPANY, INC.

TOWN OF BLUFFTON

Date: \_\_\_\_\_

Date: \_\_\_\_\_

By: \_\_\_\_\_

By: \_\_\_\_\_

Print Name: \_\_\_\_\_

Print Name: \_\_\_\_\_

Position: \_\_\_\_\_

Position: \_\_\_\_\_

Witnesses: \_\_\_\_\_

Witnesses: \_\_\_\_\_

- Attachments:
- 1. Bid Sheet
  - 2. Schedule

ATTACHMENT 1

BID SHEET

**New Riverside Barn Park - Disc Golf Course: Unit Price Schedule - ADDENDUM #2 - 4/30/2026 /  
VE REVISION 5/22/2026 (REMOVAL OF ITEMS DGC: 7-11, 13-15; LNDS CP: 1-4 ; CONT. ITEMS: 3)**

**NOTES**

1) It is the intent that bidders have included within each unit price the completion of all specified work per the project requirements. The Contractor is to provide all services, testing, labor, materials, necessary tools & equipment, freight, taxes, insurance, warranties, bonding, overhead and profit to provide a complete project item as described.

2) Unit price amounts proposed by bidders and stated on this form are per unit of measure for addition or deletion of work from the Contract Sum. Quantities are provided for Contractor's convenience only. Contractor shall notify the architect of any discrepancies during project bidding phase.

Clearing / Demo / Site Preparation						
Item	Document Reference	Description	Quantity	Units	Unit Price	Total
1	L-101 / L-102 / L-103	Removal of tree trunks (stump grinding)	20	LS	\$ 420.00	\$ 8,400.00
2	L-101 / L-102 / L-103	Limbing up / limb and vine removal up to 25'	1	LS	\$ 3,500.00	\$ 3,500.00
3	L-101 / L-102 / L-103	Grading within the fairways to remove dirt mounds / holes.	1	LS	\$ 14,450.00	\$ 14,450.00
4	L-101 / L-102 / L-103	Mulching within the fairways 3" thick (Confirmed Double Milled Hardwood - Not Dyed or Altered)	33,000	SF	\$ 0.68	\$ 22,440.00
<b>Clearing / Demo / Site Preparation Sub-Total</b>						<b>\$ 48,790.00</b>

Disc Golf Course						
Item	Document Reference	Description	Quantity	Units	Unit Price	Total
1	L-101/L-102/L-103/L-300	Tee Boxes	18	EA	\$ 2,143.89	\$ 38,590.02
2	L-101/L-102/L-103/L-300	Disc Golf Baskets (Installed by contractor / Provided by town of bluffton)	19	EA	\$ 413.00	\$ 7,847.00
3	L-101/L-102/L-103/L-300	Golf Course Layout Sign	1	EA	\$ 1,825.00	\$ 1,825.00
4	L-101/L-102/L-103/L-300	Tee Box Sign	18	EA	\$ 645.00	\$ 11,610.00
5	L-101 / L-102 / L-300	Disc Golf Attention Sign	4	EA	\$ 740.00	\$ 2,960.00
6	L-102 / L-301	Removable Bollard	1	EA	\$ 745.00	\$ 745.00
12	L-102 / L-301	Pedestrian Opening - Existing Fence modifications / opening creation / extensions	1	EA	\$ 1,244.83	\$ 1,244.83
16	L-102 / L-103 / L-301	Beware of Alligator Signs	6	EA	\$ 110.00	\$ 660.00
17		Fill dirt needed at stairs for grading adjustments.	48	CY	\$ 120.00	\$ 5,760.00
<b>Disc Golf Course Sub-Total</b>						<b>\$ 71,241.85</b>


Contractor Items						
Item	Document Reference	Description	Quantity	Units	Unit Price	Total
1		General Conditions	1	LS	\$ 47,000.00	\$ 47,000.00
2		Contractor Fee	1	LS	\$ 41,500.00	\$ 41,500.00
<b>Contractor Items Sub-Total</b>						<b>\$ 88,500.00</b>


<b>Project Total : \$</b>						<b>208,531.85</b>
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**ATTACHMENT 2**  
**SCHEDULE**

**Tentative Project Implementation Schedule as of May 13, 2026**

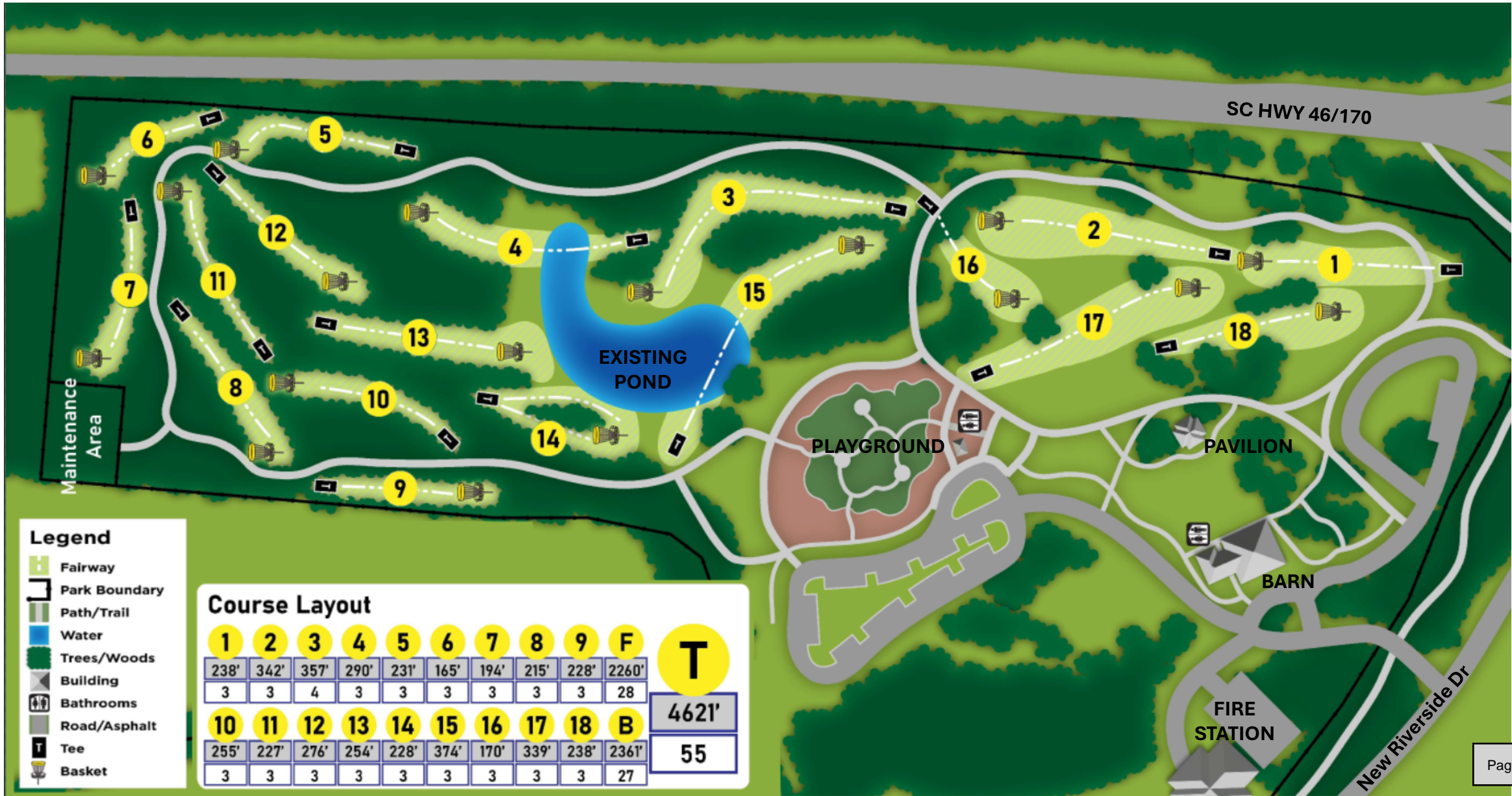
<b>Activity #</b>	<b>Activity</b>	<b>Start Date</b>	<b>End Date</b>
0	Permitting of All Structures as Directed by Building Department	6/15/2026	7/15/2026
1	Mobilization/Secure Area	7/15/2026	7/19/2026
2	Commence Clearing/Demo/Site Prep	7/22/2026	8/10/2026
3	Install Plantings & Mulch at Plantings & Commence Watering Schedule	7/22/2026	10/13/2026
4	Installation of Timber Features including Retaining Wall, Stairs, Elevated Structure	7/29/2026	8/30/2026
5	Installation of Fencing	9/3/2026	9/14/2026
6	Form, Pour, Installation of Tee Boxes	9/14/2026	9/28/2026
7	Stage and Install Mulch at All Holes	9/23/2026	9/30/2026
8	Demobilize & Final Cleanup	10/1/2026	10/13/2026
<b>TOTAL CALENDAR DAYS</b>			<b>120</b>

Capital Improvements Program Fund Project Data Sheet										
<b>Project Name</b>	NR Barn Park Phase 2 Trails and Disc Golf					<b>Project #</b>	P0011			
<b>Program Type</b>	Parks	<b>Project Manager</b>	Pat Rooney			<b>Start to End</b>	FY26 - FY28			
<b>Project Scope</b>					<b>Project Photo or Map</b>					
<p>The project consists of design, permitting and construction of an additional loop trail and Disc golf course at the New Riverside Barn Park. Phase 2 trail will consist of a perimeter loop trail on the western (wooded) portion of the Park and will connect to the existing trail system. The disc golf course layout will start and finish at the existing parking lot and will predominately be located inside the existing and proposed loop trails. Staff has applied for a Land Water Resource Conservation Grant to assist with funding for the construction of the Phase 2 trails.</p>										
<b>Project Budget</b>										
	Prior Years' Expended	FY2026 Amended Budget	FY2026 Estimate	FY2027 Proposed Budget	FY2028 Forecast	FY2029 Forecast	FY2030 Forecast	FY2031 Forecast	Total Project Forecast	
Planning	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Design	-	35,000	-	65,000	-	-	-	-	65,000	
Construction	-	100,000	58,000	637,687	-	-	-	-	695,687	
Other	-	-	-	-	-	-	-	-	-	
<b>Total</b>	<b>\$ -</b>	<b>\$ 135,000</b>	<b>\$ 58,000</b>	<b>\$ 702,687</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 760,687</b>	
<b>Strategic Focus Area &amp; Guiding Principle</b>					<b>Project Status</b>					
<p><i>Infrastructure:</i> <i>Guiding Principle #4</i> Establish long-term planning, prioritization, and investment strategies for future infrastructure and facilities that improve the quality of life for citizens while being financially sustainable. <i>Community Quality of Life:</i> <i>Guiding Principle # 5:</i> Foster and support place-based initiatives and evaluate community policies, programs, gathering spaces, and events that promote healthy and quality lifestyles for our diverse citizenry.</p>					<p>Final design of the western loop trail and disc golf will be complete in FY26 and construction is planned for FY27.</p>					
<b>Project Orientation</b>					<b>Project Performance Measures</b>					
2020 Conceptual Master Plan and FY25-FY26 Strategic Plan					Increased recreational opportunities and use by citizens and visitors.					
<b>General Fund Operations &amp; Maintenance (O&amp;M) Costs</b>										
	Description	FY2027 Forecast	FY2028 Forecast	FY2029 Forecast	FY2030 Forecast	FY2031 Forecast	Total Forecast			
Operations	Utilities		\$ 500	\$ 500	\$ 500	\$ 500	\$ 2,000			
Maintenance	Landscape and Hardscape		3,000	3,000	3,000	3,000	12,000			
<b>Total</b>		<b>\$ -</b>	<b>\$ 3,500</b>	<b>\$ 3,500</b>	<b>\$ 3,500</b>	<b>\$ 3,500</b>	<b>\$ 14,000</b>			
<b>Method for Estimating Costs:</b>										

Capital Improvements Program Fund Project Data Sheet										
<b>Project Name</b>	NR Barn Park Phase 2 Trails and Disc Golf					<b>Project #</b>	P0011			
<b>Program Type</b>	Parks	<b>Project Manager</b>			Pat Rooney	<b>Start to End</b>	FY26 - FY28			
<b>Project Scope</b>					<b>Project Photo or Map</b>					
<p>The project consists of design, permitting and construction of an additional loop trail and Disc golf course at the New Riverside Barn Park. Phase 2 trail will consist of a perimeter loop trail on the western (wooded) portion of the Park and will connect to the existing trail system. The disc golf course layout will start and finish at the existing parking areas and will predominately be located inside the proposed western new loop trail.</p>										
<b>Project Budget</b>										
	Prior Years' Expended	FY2025 Amended Budget	FY2025 Estimate	FY2026 Proposed Budget	FY2027 Forecast	FY2028 Forecast	FY2029 Forecast	FY2030 Forecast	Total Project Forecast	
Planning	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Design	-	-	-	35,000	-	-	-	-	35,000	
Construction	-	-	-	100,000	475,000	-	-	-	575,000	
Other	-	-	-	-	-	-	-	-	-	
<b>Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 135,000</b>	<b>\$ 475,000</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 610,000</b>	
<b>Strategic Focus Area &amp; Guiding Principle</b>					<b>Project Status</b>					
<p><i>Infrastructure:</i>  <i>Guiding Principle #4</i> Establish long-term planning, prioritization, and investment strategies for future infrastructure and facilities that improve the quality of life for citizens while being financially sustainable.  <i>Community Quality of Life:</i>  <i>Guiding Principle # 5:</i> Foster and support place-based initiatives and evaluate community policies, programs, gathering spaces, and events that promote healthy and quality lifestyles for our diverse citizenry.</p>					<p>Preliminary design of the western loop trail is underway. Final design of the trail and disc golf will be completed in FY26 and construction completed in FY27.</p>					
<b>Project Orientation</b>					<b>Project Performance Measures</b>					
2020 Conceptual Master Plan and FY25-FY26 Strategic Plan					Increased recreational opportunities and use by citizens and visitors.					
<b>General Fund Operations &amp; Maintenance (O&amp;M) Costs</b>										
	Description	FY2026 Forecast	FY2027 Forecast	FY2028 Forecast	FY2029 Forecast	FY2030 Forecast	Total Forecast			
Operations							\$ -			
Maintenance							-			
<b>Total</b>		<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>			
<b>Method for Estimating Costs:</b>										

# New Riverside Barn Park Disc Golf Plan

Section X. Item #7.



**Approval to Authorize a Construction Contract with Nix Construction Co., Inc.  
for the New Riverside Barn Park Disc Golf Course (Fiscal Impact - \$229,385.03)**

**Proposed Motion**

*“I move to **approve (deny or approve as amended)** authorizing the Town Manager to enter into a Contract with Nix Construction Co., Inc. for construction of the Disc Golf Course at the New Riverside Barn Park in the amount of \$229,385.03, which includes a 10% contingency.”*

TOWN COUNCIL



STAFF REPORT  
Finance & Administration Department

<b>MEETING DATE:</b>	June 09, 2026
<b>PROJECT:</b>	Consideration of Approval of Resolution for the FY2027 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
<b>PROJECT MANAGER:</b>	Natalie Majorkiewicz, CGFO, CGFM, Director of Finance & Administration

**REQUEST:**

Town Council to authorize 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 2027 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 19, 2026, where the Hilton Head Island-Bluffton Chamber of Commerce presented the FY2026 budget and marketing plan.

**☐ Designated Marketing Organization Budget and Marketing Plan for FY2027**

- As part of contract 2022-35 that began on July 1, 2022, with an amendment for a two-year renewal ending June 30, 2027, the Hilton Head Island-Bluffton Chamber of Commerce proposed a fiscal year 2027 budget of \$340,000 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 FY2027.
- FY2027 will be the final year of a two-year term extension of the contract.

Below is a comparison between the FY2026 and FY2027 budgets:

<b>Bluffton Marketing Strategies and Programs</b>	<b>FY2026 Budget</b>	<b>FY2027 Budget</b>	<b>% Increase/ (Decrease)</b>
Digital Promotions/SEM	\$ 25,992	\$ 39,665	53%
Website Maintenance	19,494	17,000	(13%)
Website Hosting	1,170	2,720	132%
Social Marketing & Content Strategy	19,494	19,266	(1%)
Paid Social	27,844	28,332	2%
SEO	11,696	11,333	(3%)
Public Relations	-	8,500	100%
Bluffton Vacation Planner/Fulfillment	81,225	50,998	(37%)
Regional Vacation Planner/Fulfillment	16,245	11,333	(30%)
Group Tour	-	3,513	100%
Photography/Videography	6,498	-	(100%)
Research & Planning	12,996	11,333	(13%)
Operations & Management	142,350	136,007	(100%)
<b>Total:</b>	<b>\$ 365,004</b>	<b>\$ 340,000</b>	<b>(7%)</b>

**The committee voted to recommend the Hilton Head Island-Bluffton Chamber of Commerce's Town of Bluffton DMO budget and marketing plan for FY2027.**

**NEXT STEPS:**

Upon approval by Town Council, the Town Manager will authorize the resolution for FY2027.

**SUMMARY:**

The resolution will be for one year beginning on July 1, 2026 through June 30, 2026 and in accordance with the amendment to contract 2022-35.

**ATTACHMENTS:**

1. Resolution Approving FY2027 Budget and Marketing Plan
2. DMO Contract 2022-35 Amendment # 1 between Hilton Head Island-Bluffton Chamber of Commerce and Town of Bluffton
3. Hilton Head Island-Bluffton Chamber of Commerce: FY2027 Budget and Marketing Plan
4. Recommended Motion

**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 FY2027 BUDGET AND MARKETING PLAN AND IN ACCORDANCE WITH CONTRACT 2022-35 AMENDMENT # 1.**

**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;

**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; and

**WHEREAS**, the Town of Bluffton exercises the option to renew contract 2022-35 for the two-year renewal term through Amendment 1.

**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 FY2027
- In accordance with South Carolina state law, the DMO has submitted for approval an annual budget of planned expenditures by April 1<sup>st</sup> for FY2026
- For FY 2027, 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
- Immediately upon receipt to the special fund on a quarterly basis, the Town shall distribute the tourism promotion funds to the DMO
- The DMO shall render to the Town an accounting of all FY2027 expenditures by no later than November 1, 2027.

**THIS RESOLUTION SHALL TAKE FULL FORCE AND EFFECT ON JULY 1, 2026.**

**SIGNED, SEALED AND DELIVERED AS OF THIS 9<sup>th</sup> DAY OF JUNE 2026.**

\_\_\_\_\_  
Larry C. Toomer, Mayor  
Town of Bluffton, South Carolina

ATTEST:

\_\_\_\_\_  
Marcia Hunter, Town Clerk  
Town of Bluffton, South Carolina

STATE OF SOUTH CAROLINA )  
 )  
COUNTY OF BEAUFORT )

AMENDMENT # 1  
TO  
CONTRACT # 2022-35

**WITNESSETH:**

**WHEREAS**, Contract # 2022-35 was made and entered into the 24th day of June, 2022 between the Town of Bluffton (hereinafter the "Town") and the Hilton Head Island-Bluffton Chamber of Commerce (hereinafter "Chamber"); and

**WHEREAS**, Section 5 of Contract # 2022-35 contemplated a three-year initial term with the option to renew for one additional two-year term; and

**WHEREAS**, the Town and Chamber agree to amend Contract #2022-35 as described herein.

**NOW, THEREFORE**, in exchange for the mutual promises written herein and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, and intending to be legally bound, the Town and the Chamber agree as follows:

1. Town and Chamber agree to renew Contract # 2022-35 for the two-year renewal term effective for the period from 7/1/2025 to 6/30/2027.
2. All other terms and conditions of Contract # 2022-35 shall remain in full force and effect and remain unchanged except as stated herein.

**IN WITNESS WHEREOF**, the parties hereto have caused the within Amendment # 1 to Contract # 2022-35 to be executed this 25th day of November, 2025.

HILTON HEAD ISLAND-BLUFFTON  
CHAMBER OF COMMERCE

TOWN OF BLUFFTON

Date: 11-24-2025

Date: 11/25/2025

By: William G. Miles

By: [Signature]

Print Name: William G. Miles

Print Name: Stephen Steese

Position: PRESIDENT + CEO

Position: Town Manager

Witness: [Signature]

Witness: \_\_\_\_\_

- Attachments:
1. Resolution

FY 2026–2027

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# TOWN OF BLUFFTON

DESTINATION MARKETING PLAN

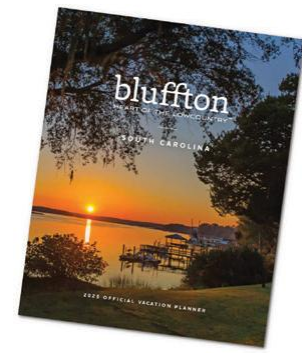
# Agenda

- 2025 Year in Review
- Executive Summary
- FY 2026-2027 Destination Marketing Plan



# Year in Review

## Vacation Planner



Mail Fulfillment:  
**27,505**

## Website

Pageviews:  
**325K+**

Ad Impressions:  
**40K+**

Referrals:  
**38K**



Average Time on Site:  
(0.43 industry average)  
**21.95**

## Paid Media Partnerships

Condé Nast  
**Traveler**

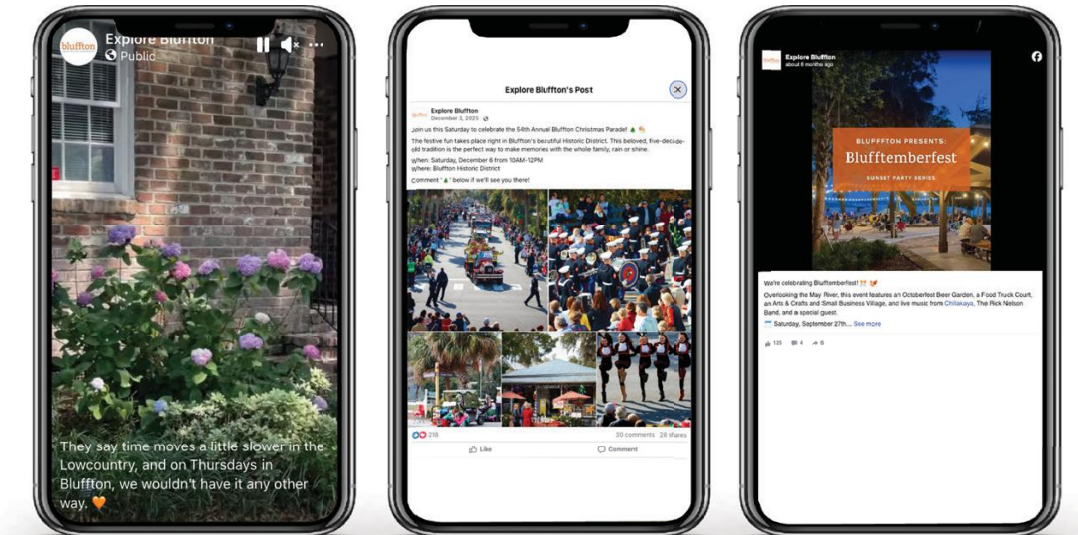
SPONSORED CONTENT BY  
**bluffton**  
Heart of the Lowcountry



## Social

New Followers:  
**8,629**

Impressions:  
**9,992,661**



## Occupancy Metrics

Occupancy:  
**66.4%**  
(-13%)

ADR:  
**\$129**  
(flat)

REVPAR:  
**\$85**  
(-13%)

## Public Relations

Mentions:  
**190**

Impressions:  
**6,681,345,171**

Ad Value:  
**\$1,981,363**

# Accolades

- **Southern Living**  
10 Best Fall Getaways in The South
- **Country Living**  
15 Under-the-Radar Small Towns Worth Checking Out This Spring
- **Ebony**  
The Best in Black-Owned Dining
- **Travel & Leisure**  
11 Best Places to Live in South Carolina
- **Country Living**  
These Are America's 10 Best Small Towns for 2025



# Executive Summary

## FY 2026-2027 Bluffton Marketing Plan Executive Summary

The Hilton Head Island & Bluffton Chamber of Commerce/Visitor & Convention Bureau continues to be the leader in promoting tourism for Bluffton. The organization as a whole utilizes national economic and tourism trends, consumer research, prior program performance and demographics and takes into consideration the needs of our community (residents and businesses) to be in the best position as the steward of the destination.

We have partnered closely with the Town of Bluffton to identify these pillars of marketing:

- May River Coastal Lifestyle
- Montage + Luxury Experiences
- Culinary + Dining
- Culture + Heritage
- Events + Community



# Vision

A welcoming world-class community embracing nature, culture and economic vibrancy to residents and visitors.

# Mission

Stimulate the regional economy while enhancing the quality of life for all.

# Brand Commitment

Bluffton, Heart of the Lowcountry™, speaks to more than geography—it reflects the Town’s spirit, charm, and role as a driving economic force in the region. But most importantly, it’s a feeling. In Bluffton, you don’t just visit—you feel the love. It’s genuine and unmistakably authentic. You see it in the heart symbol on a storefront window, in the pride residents take in historic Old Town Bluffton and in the warmth shared with friends and strangers alike at an oyster roast. Bluffton is a place that captures hearts through its people, traditions and unmistakable Lowcountry character, creating a sense of connection and community unlike anywhere else.

# FY 2026-2027 Goals, Strategies & Tactics

## Goals:

- Destination alignment and community engagement.
- Sustainable tourism and infrastructure preservation and development.
- Rejuvenation and elevation of the destination with a focus on quality over quantity.
- Priority sales and marketing initiatives.

## Strategies:

- Build brand awareness and support qualified visitation to the destination among target out markets.
- Drive the discovery and exploration of the destination with deeper storytelling of the destination's key attributes.
- Leverage a strategic mix of targeted methods to identify and reach the most qualified users.
- Create an understanding of, and respect for, the delicate ecosystem of the destination.
- Enhance Leisure and Group business through qualified visitation.

# Budget

## Bluffton/Southern Beaufort County Budget (FY 2026-2027)

	FY 2027 VCB TOTALS	FY 2027 BLUFFTON (55%)	FY 2027 SBC (45%)
<b>REVENUES</b>	Bluffton & SBC		
Town of Bluffton DMO	\$340,000	\$340,000	
Southern Beaufort County DMO	\$260,000		\$260,000
<b>TOTAL REVENUES</b>	<b>\$600,000</b>		
<b>EXPENSES</b>			
Digital Promotions / SEM	\$70,000	\$39,665	\$30,334
Website Maintenance	\$30,000	\$16,999	\$13,000
Website Hosting	\$4,800	\$2,720	\$2,080
Social Marketing & Content Strategy	\$34,000	\$19,266	\$14,734
Paid Social	\$50,000	\$28,332	\$21,667
SEO	\$20,000	\$11,333	\$8,667
Bluffton Insiders (enews)	\$0	\$0	\$0
Public Relations	\$15,000	\$8,500	\$6,500
Bluffton Vacation Planner/Fulfillment	\$90,000	\$50,998	\$39,001
Regional Vacation Planner/Fulfillment	\$20,000	\$11,333	\$8,667
Media Partnerships	\$0	\$0	\$0
Group Tour	\$6,200	\$3,513	\$2,687
Photography/Videography	\$0	\$0	\$0
Research & Planning	\$20,000	\$11,333	\$8,667
Contingency	\$0	\$0	\$0
Ops & Management	\$240,000	\$136,007	\$103,998
<b>TOTAL EXPENSES</b>	<b>\$600,000</b>	<b>\$340,000</b>	<b>\$260,000</b>

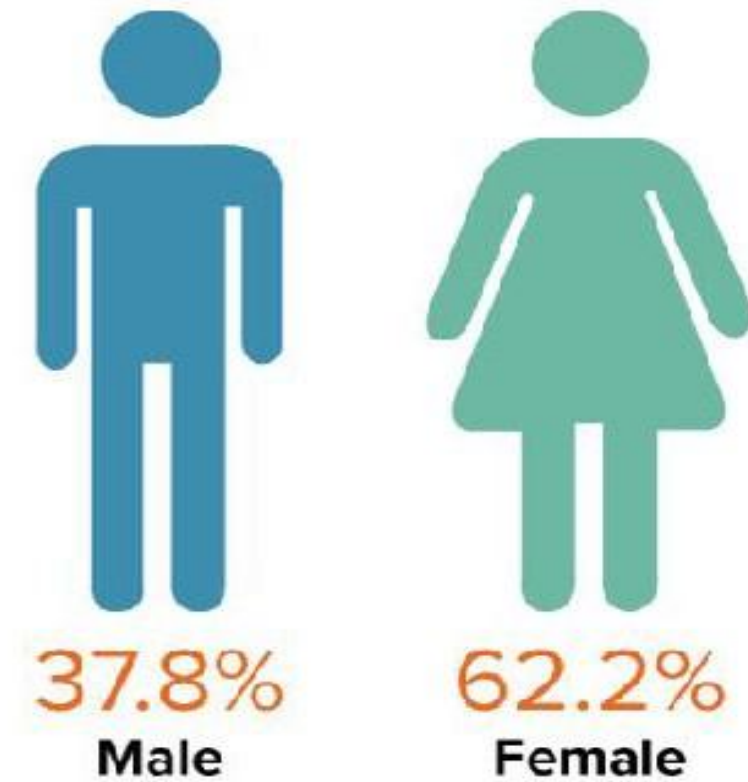
# Demographics & Personas

We use multiple primary and secondary data sources to understand who our visitors are and what motivates them to visit Bluffton. Our real-time data sources include Google Analytics, Placer.ai, and Zartico. In addition, we partner with the Office of Tourism Analysis at the College of Charleston and the University of South Carolina Beaufort.

Using these insights we can extract visitor persona detail which allows us the ability to further refine our messaging to a more qualified potential consumer.

Today, as we continue to adjust to the traveler's needs, we will keep our demographics and key personas at the forefront, adapting where necessary to address consumer travel sentiment.

## Our Target Leisure Traveler for the Region



### Self-Identify

Source: 2025 Bluffton Visitor Profile Study, Office of Tourism Analysis, College of Charleston



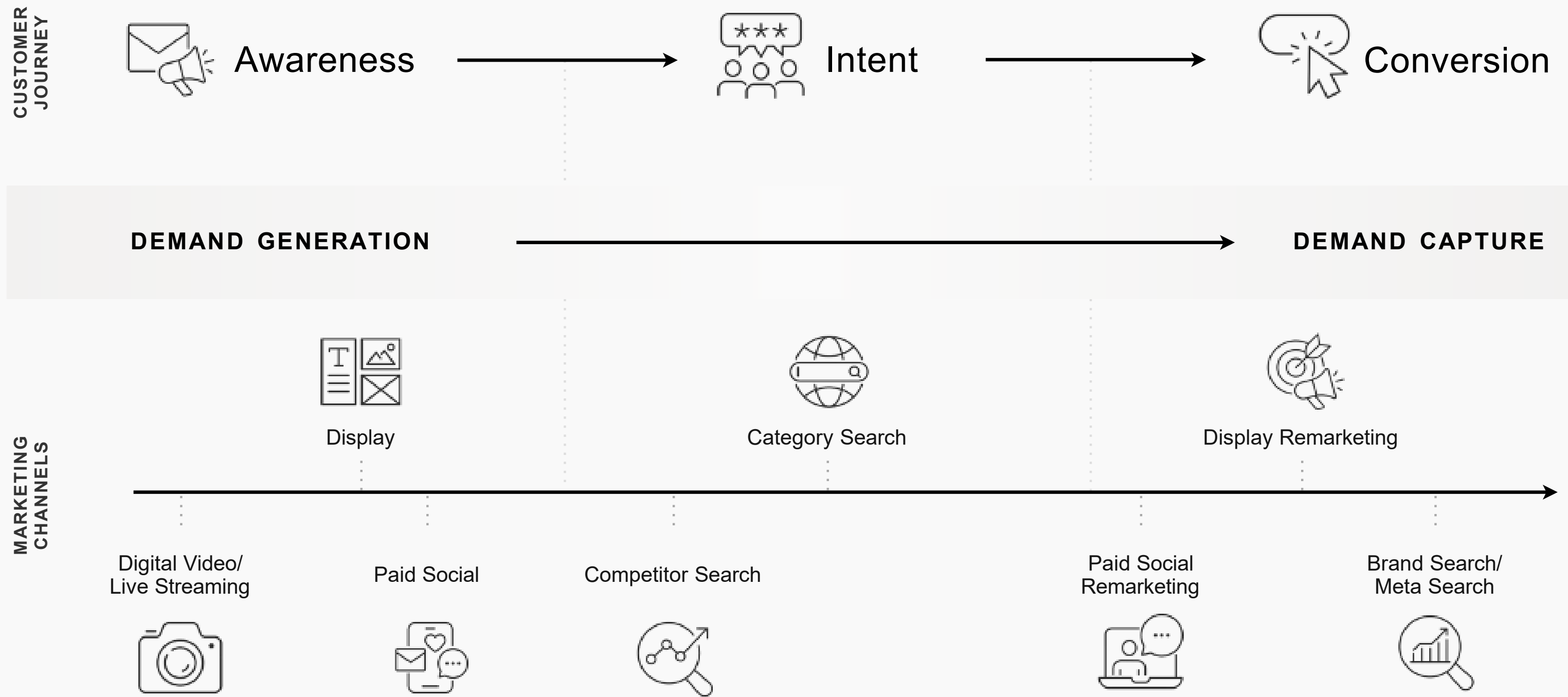
Persona	Tactic	
<b>Family</b>	<ul style="list-style-type: none"> <li>• Digital video/connected TV advertising</li> <li>• Facebook /Instagram advertising</li> <li>• Social and blog itineraries</li> </ul>	<ul style="list-style-type: none"> <li>• Search advertising</li> <li>• Influencer family partnership</li> </ul>
<b>Weekenders</b>	<p>Social media partnerships with influencers including:</p> <ul style="list-style-type: none"> <li>• Couples</li> <li>• Paid search targeting branded and category terms such as “weekend getaway”</li> <li>• Friend groups</li> <li>• Weekend itineraries for blog/site/social</li> <li>• Social advertising</li> </ul>	
<b>Arts, Culture &amp; History Buffs</b>	<ul style="list-style-type: none"> <li>• Google Display Network and social display</li> <li>• Digital video/connected TV advertising</li> <li>• Culture &amp; History itineraries</li> </ul>	<ul style="list-style-type: none"> <li>• Influencer partnership content</li> <li>• Long-form content (blogs)</li> </ul>
<b>Culinary Travelers</b>	<ul style="list-style-type: none"> <li>• Digital /connected TV advertising</li> <li>• Restaurant listings</li> <li>• Social advertising</li> </ul>	<ul style="list-style-type: none"> <li>• Organic social posts focused on food and drink</li> <li>• Festival &amp; Event information and promotions</li> <li>• Food itineraries and tour information</li> </ul>
<b>Activities &amp; Recreation Enthusiasts</b>	<ul style="list-style-type: none"> <li>• Social advertising</li> <li>• Digital video/connected TV advertising</li> </ul>	<ul style="list-style-type: none"> <li>• Maps and itineraries outlining convenience of staying / proximity to nearby activities and experiences</li> </ul>
<b>Snowbirds</b>	<p>Seasonal campaign featuring:</p> <ul style="list-style-type: none"> <li>• Digital video advertising</li> <li>• Search advertising</li> <li>• Social advertising</li> <li>• Accommodation aggregated offers</li> </ul>	

# What's Ahead in FY 2026-2027

# Digital Marketing

With the May River, a thriving arts and culture scene, diverse culinary experiences, outdoor recreation, and a vibrant local community, the Town of Bluffton is well positioned to meet the needs and interests of today’s travelers. The marketing plan is designed to be highly personalized, flexible, and results-oriented. Each individual campaign that is implemented to drive exposure for the destination will be deployed based on a series of defined goals that align with each persona, and the overarching goal for the marketing plan.

# Conversion Focused Digital Media



# Generative Engine Optimization (GEO)

## The Old Way

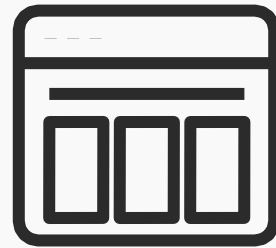


## The New Way



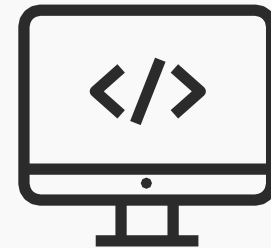
# SEO & GEO - Laying the Groundwork

A successful data-informed content strategy that will grow the organic search footprint for your brand both on traditional SERPs (Search Engine Results Page) as well as within Generative AI applications can be focused on the following core pillars:



## On Page

The optimization and data-informed creation of content will drive increased exposure in search engines leading to better engagement.



## Technical

Ongoing technical audit and comprehensive review of the existing website to ensure current issues in the technical infrastructure are identified.



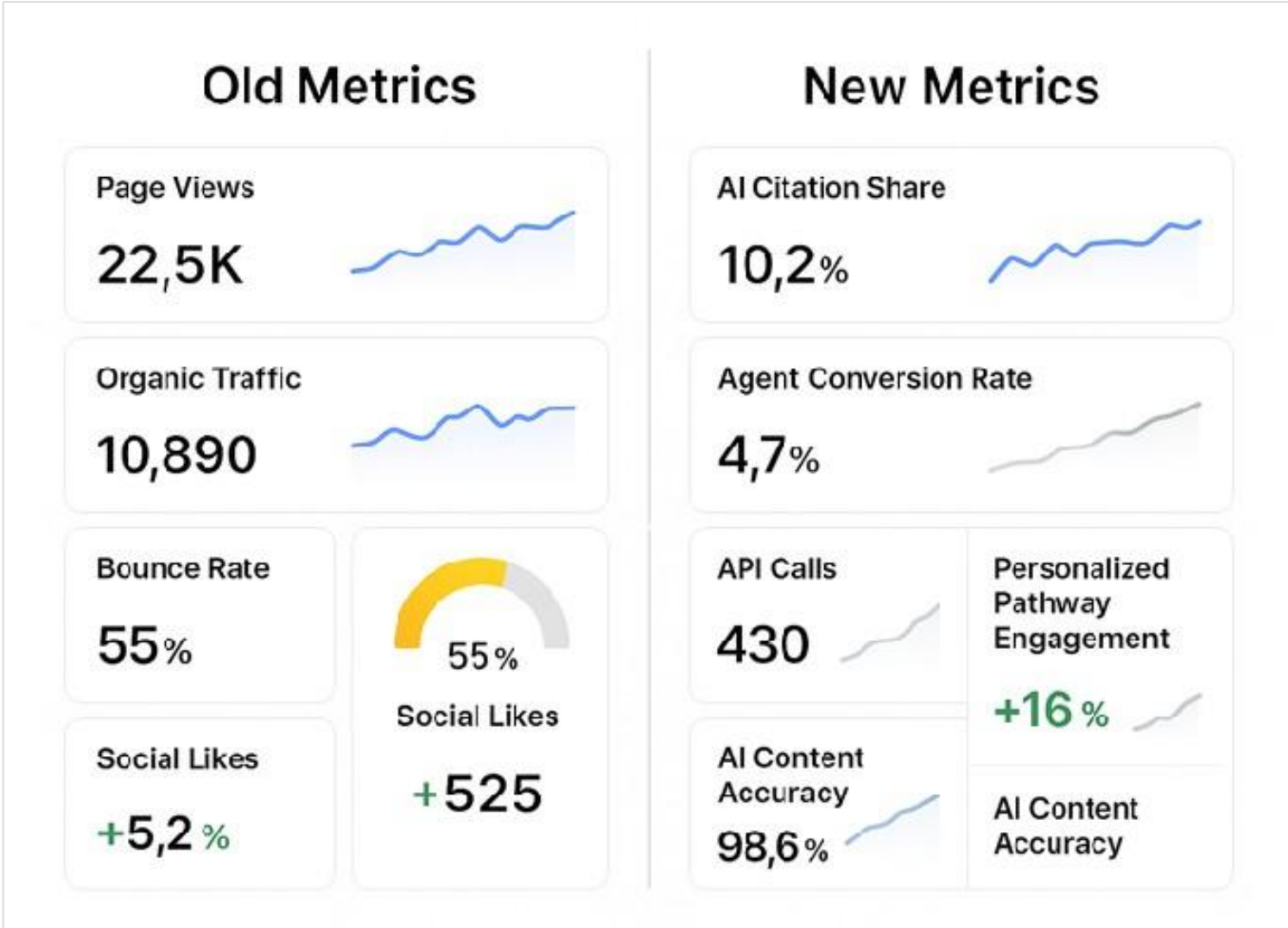
## Off Page

Link building through a personalized outreach program, and amplified exposure through influencer outreach and a targeted social media strategy.

# Traditional KPIs No Longer Tell the Full Story.

## New KPIs Could Include:

- AI Search Visibility: Share of citations in generative AI results for target queries.
- Agent-Driven Conversions: Number and value of bookings completed through AI agents.
- API Engagement: Call volume, uptime, and usage by third-party platforms.
- Audience Engagement: Interaction with personalized pathways and tailored content.
- Content Performance in AI: Frequency and accuracy of brand mentions in AI responses.

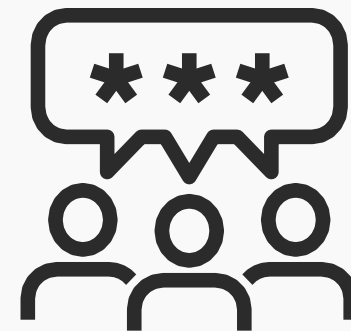


# What's Next? GEO Is the New Digital PR



## Be Technically Impeccable

Keep your site fast, error-free, and structured so AI can read and trust it. Use emerging tools (like llms.txt) to give Large Language Models extra context about your brand.



## Build Digital Credibility

Cultivate partnerships, manage your online reputation, and earn authoritative backlinks. Keep your brand details (NAP) consistent so LLMs see you as a trusted source.



## Create AI-Ready Content

Publish high-value, relevant, and diverse content designed to be cited in AI answers—then test and refine for the new search landscape.

# Destination Websites

The VisitBluffton.org website is a key component of the destination marketing strategy and often serves as one of the first touch points for potential visitors to Bluffton. We will continue refining our ability to identify qualified visitors, ensure a seamless user experience, and drive relevant, high-quality traffic to partner websites. Content will be refreshed regularly, with new and engaging material added to keep the site current and compelling. Ongoing optimizations to both content and site structure will be guided by search engine optimization (SEO) and generative engine optimization (GEO) research, as well as trends data and referral insights.

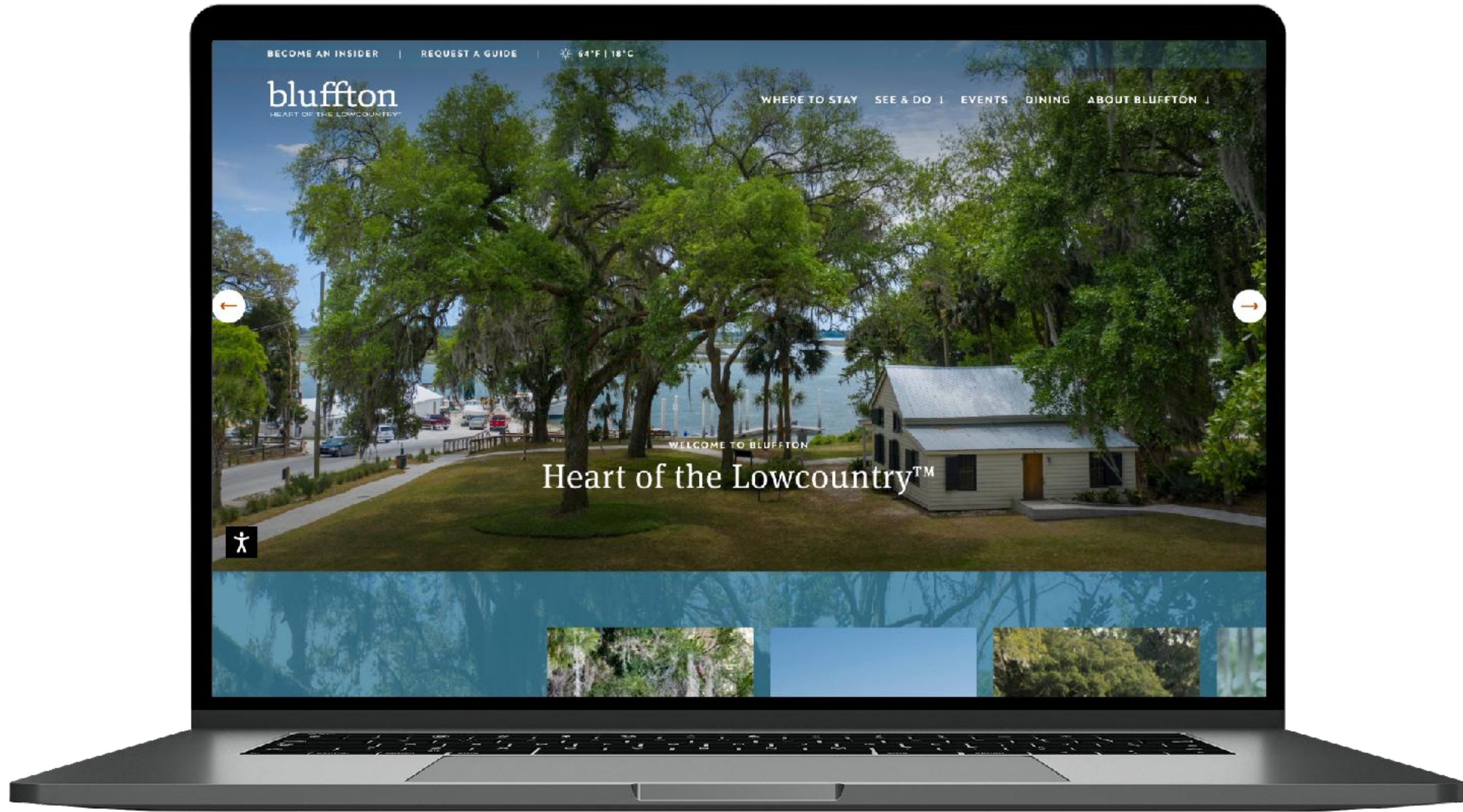


# Destination Websites

## Data Strategy & Personalization

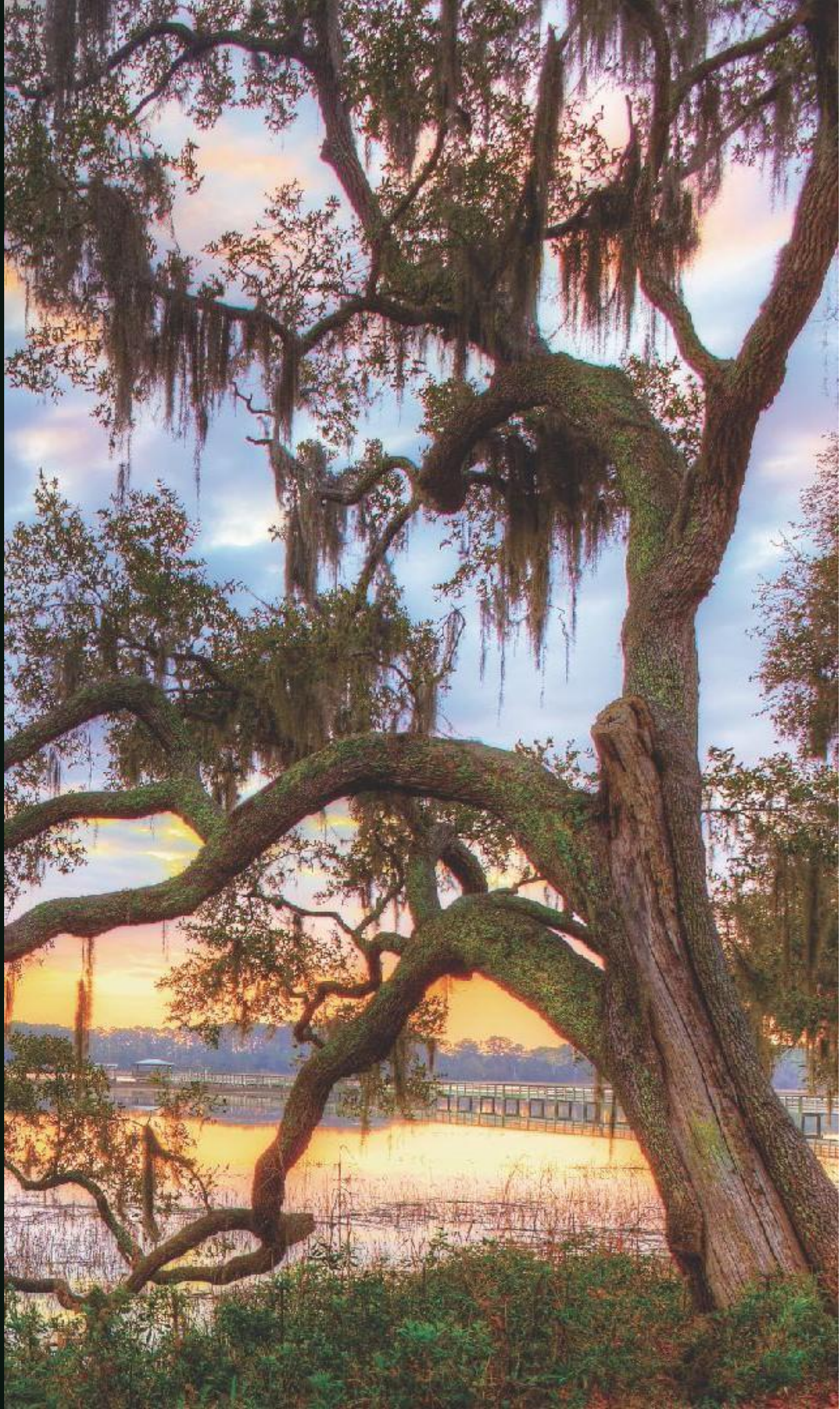
Utilizing first-party and zero-party data, the brand will work to gain a clearer understanding of prospective visitors' behaviors and implicit desires to build a personalized, one-to-one communication strategy. This begins at the VisitBluffton.org website and extends across the brand's entire digital marketing ecosystem.

The Visitor & Convention Bureau will create a data-driven, always-on content strategy that is relevant and compelling, aligning with visitors' mindsets and interests. As prospective visitors move through their journey, the brand will continue to tailor messaging through sequential storytelling, making the destination experience more meaningful and relevant to each individual. Ongoing analysis of audience data will provide insights that inform decisions about market opportunities and high-value audience segments, ultimately leading to higher engagement with the destinations and more outbound referrals to partners.



# Social Media

In FY 2026-2027, our strategy evolves from broad visibility to Generative Engagement Optimization (GEO). By fostering deep local connection and quality community engagement, we will create the social proof required for platforms to position Bluffton as a premier destination for natural beauty, arts, culture and history.



# Social Media

## Goals:

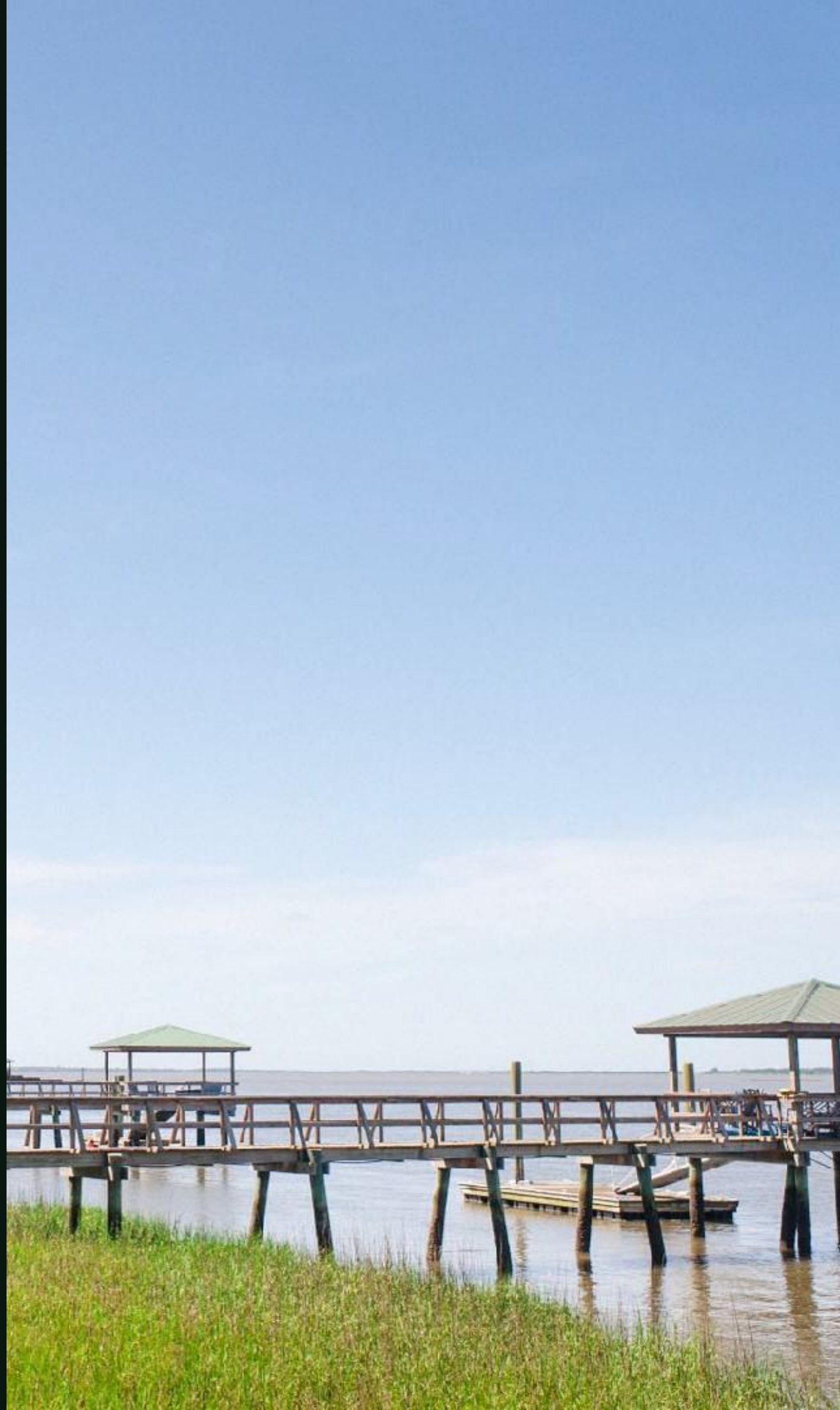
- Showcase our brand pillars with a balanced content mix.
- Support local businesses and stakeholders.
- Capitalize on top-performing content types.
- Further generate destination awareness in key markets.
- Strengthen discoverability in search and AI-driven travel tools.



# Destination Public Relations

As we move into the new fiscal year, our strategy focuses on leveraging earned media and influencer partnerships to navigate an increasingly digital landscape. By prioritizing mobile-friendly content and curated storytelling, we aim to drive destination awareness and capture the interest of travelers who rely on trusted digital voices to inform their purchase decisions.

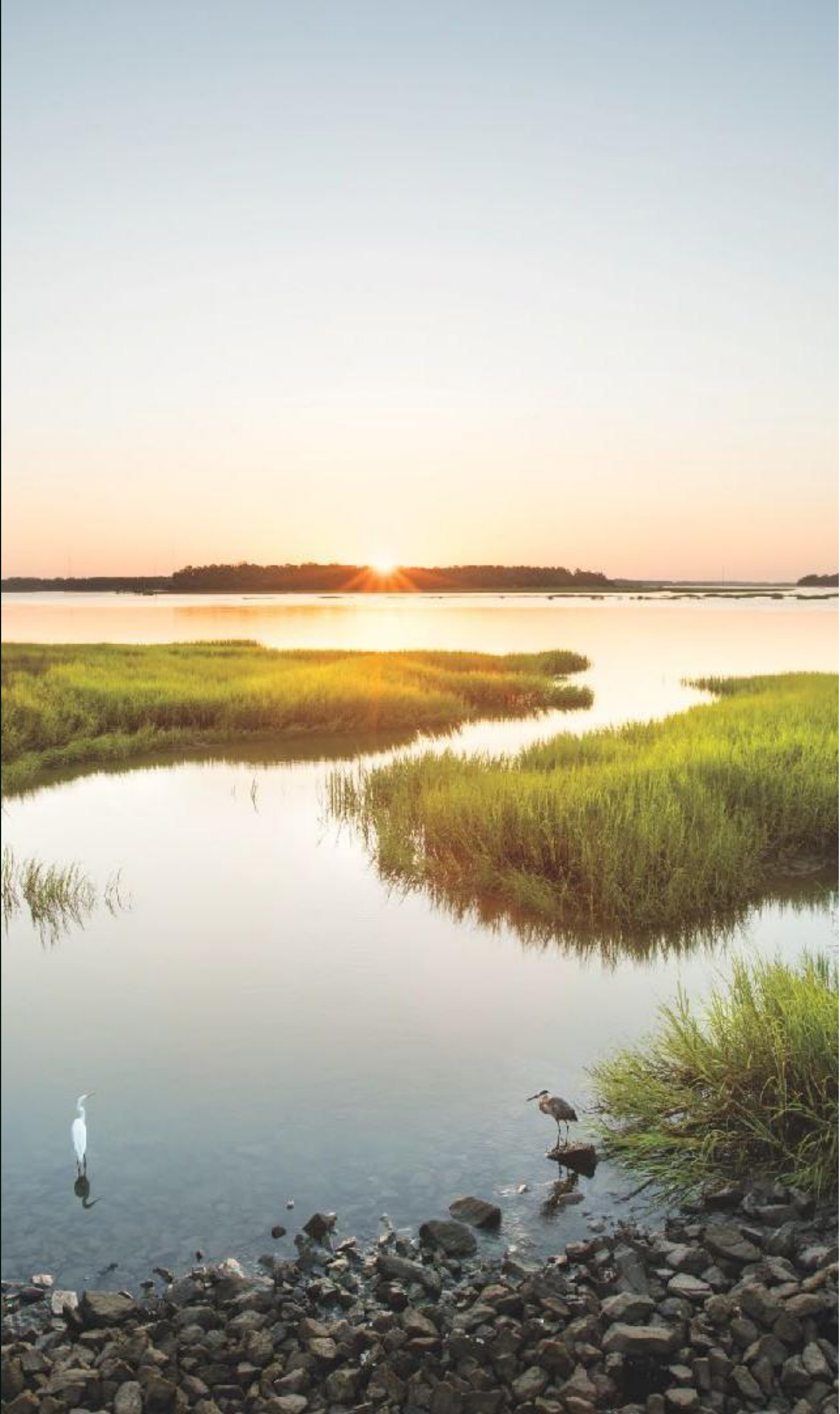
To keep Bluffton competitive, we will highlight authentic, sustainable, and culturally rich experiences that cater to the modern demand for "escapism." By maintaining strong media relationships and adapting to emerging trends, we will generate the consistent buzz necessary to position the Heart of the Lowcountry™ as a premier choice for meaningful, unforgettable getaways.



# Leisure Media Partnerships

Select leisure media partnerships can complement earned media efforts by extending the destination story within travel and lifestyle media environments that inspire trip planning.

These opportunities allow Bluffton to reinforce their presence within trusted editorial platforms where travelers seek ideas, recommendations and destination inspiration.



# Meetings & Group Sales

Bluffton’s meetings strategy focuses on high-value, experience-driven gatherings that align with the destination’s luxury assets and authentic Lowcountry character. With world-class accommodations and natural riverfront landscapes, Bluffton offers planners a refined alternative to larger convention destinations.

Rather than competing for high-volume convention business, the region is best positioned to attract premium meetings, executive retreats, and incentive programs that prioritize setting, service, and meaningful experiences.

This approach ensures meetings generate strong economic impact while preserving the charm and scale that define Bluffton as the Heart of the Lowcountry.



# Leverage Regional Drive Markets & Air Access

The strongest opportunities remain Southeastern drive markets, including:

- Atlanta
- Charlotte
- Charleston
- Jacksonville
- Raleigh-Durham
- Orlando / Tampa

In addition, convenient access through Savannah/Hilton Head International Airport provides connectivity from major domestic markets.

This combination supports both corporate retreats and national association meetings seeking an inspiring destination that remains easy to reach.



# Build Meetings Around Authentic Experiences

Today's planners want experiences that reflect the destination. Bluffton delivers with:

- Private May River sunset receptions
- Historic district culinary tours
- Gullah cultural heritage experiences
- Chef-led Lowcountry dinners and oyster roasts
- Kayaking, boating, and eco-tours
- Art gallery and artisan studio events

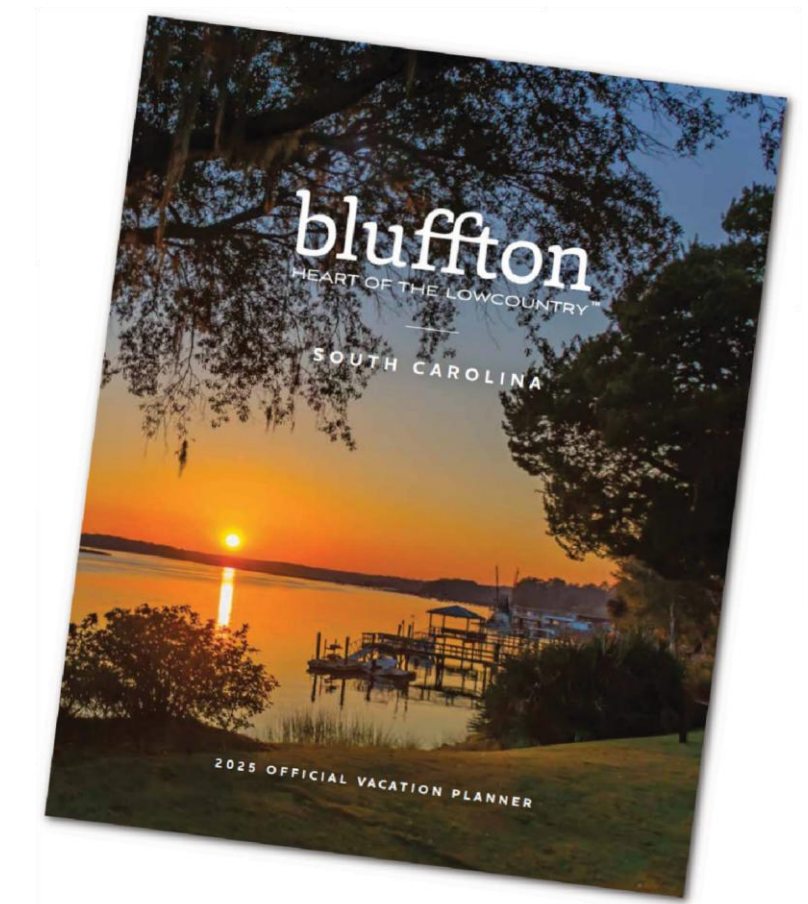
These experiences create memorable programs and increase visitor spend.

# Collateral and Fulfillment Promotions and Brochure Distribution

The Bluffton Official Vacation Planner, our comprehensive guide to what to see and do, is our primary print fulfillment piece for the destination. We receive many online, as well as media and phone inquiries, and distribute the planner to state and local welcome centers, airports, along with tradeshow and promotional events with media.

Included in our budget is a dedicated campaign for the promotion of the Bluffton Official Vacation Planner for visitors to request a guide as well as for fulfillment and distribution costs. The books are distributed through:

- Online requests
- Phone inquiries
- Savannah/Hilton Head International Airport
- Hilton Head Island Airport
- South Carolina Welcome Centers
- AAA offices nationwide
- Hotel partners
- Tradeshow
- Events



**Media Fulfillment: 27,505  
(in 2025)**

# Research & Analytics

Throughout the year, we gather and analyze detailed data to better understand the region’s visitors and their travel behaviors. These insights inform targeted marketing and advertising initiatives designed to grow and sustain Bluffton’s tourism economy. The following programs will be ongoing:

1. Maintenance of ThinkBluffton.org
2. KeyData reporting, which tracks lodging occupancy, average daily rate (ADR), room demand, and RevPAR for hotels, including comparative analysis with competitive destinations.
3. Partnership with the College of Charleston Office of Tourism Analysis to produce annual economic impact reports.
4. Collaboration with the University of South Carolina Beaufort to conduct research on local events and their economic impact.
5. Analysis of Placer.ai and Zartico visitor tracking data to better understand who the region’s visitors are, where they come from, and what they value most about the destination.



Thank You



Recommendation of Motion

Consideration to Approve a Resolution for the FY2027 Budget and Marketing Plan presented by the Hilton Head Island-Bluffton Chamber of Commerce in accordance with amendment 1 to contract 2022-35.

**"I move to approve a Resolution for the FY2027 Budget and Marketing Plan with the Hilton Head Island-Bluffton Chamber of Commerce."**



STATISTICAL INFORMATION

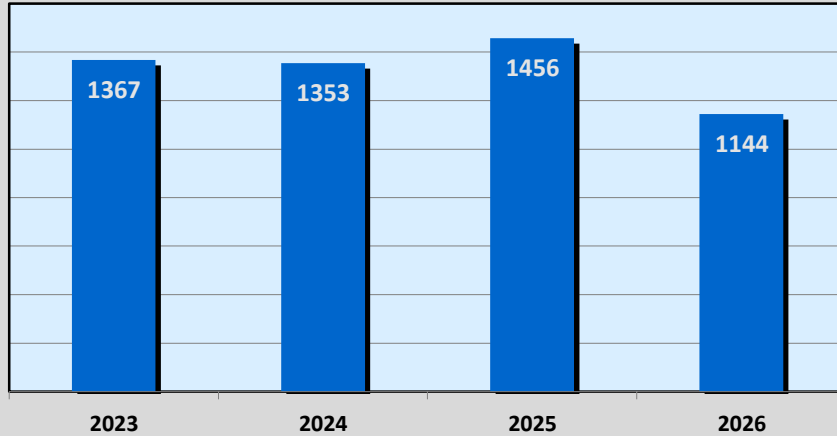
# BLUFFTON POLICE DEPARTMENT

May 27, 2026

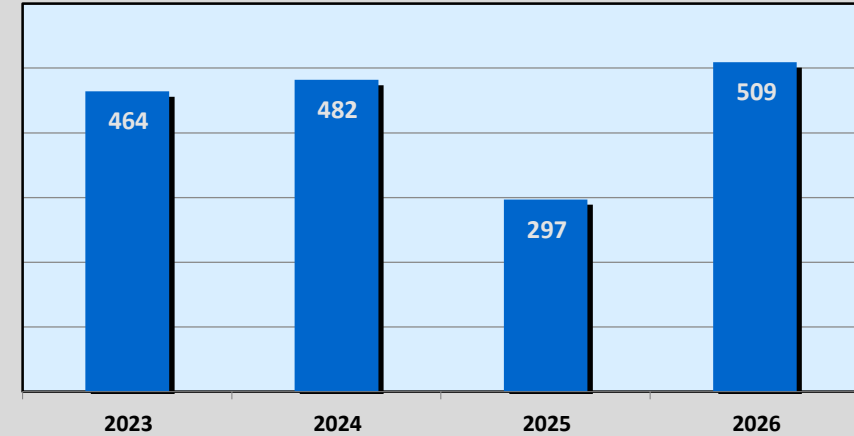
Presented by Chief Joseph Babkiewicz

# DEPARTMENT HIGHLIGHTS

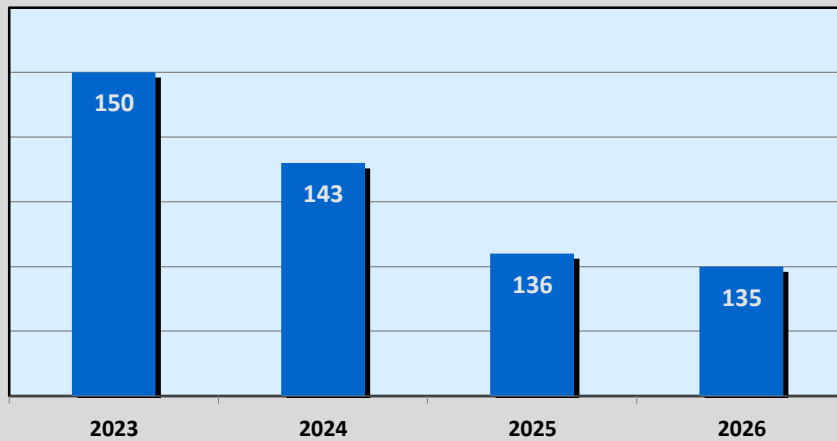
### May Calls for Service Comparison



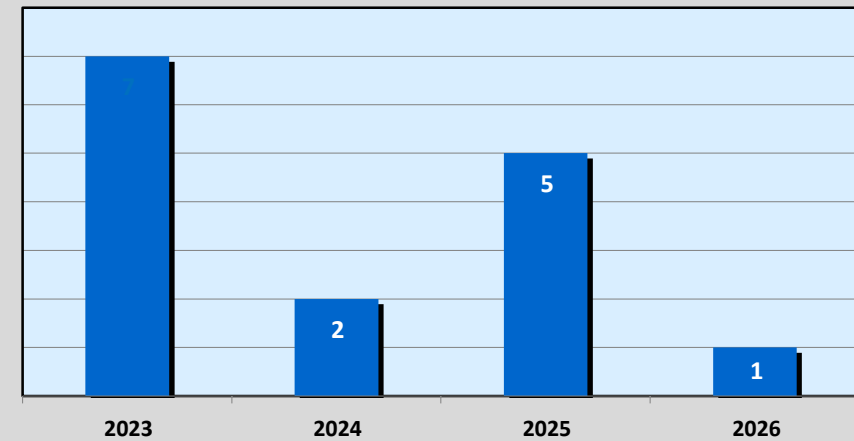
### May Traffic Citation Comparison



### May Collision Comparison

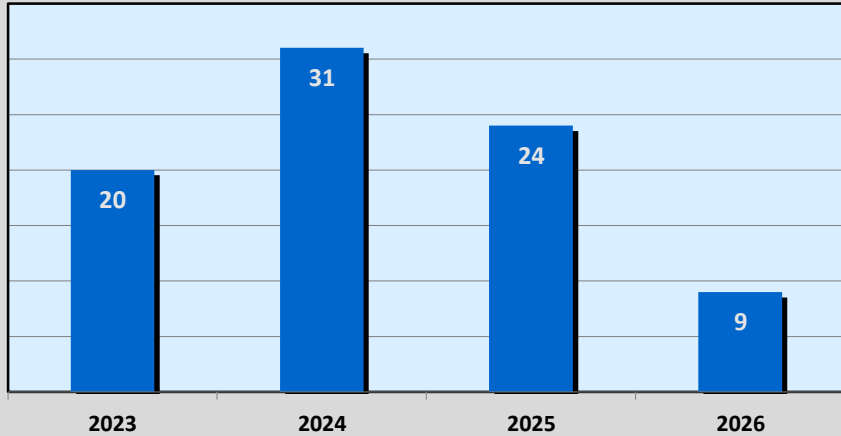


### May Burglary Comparison

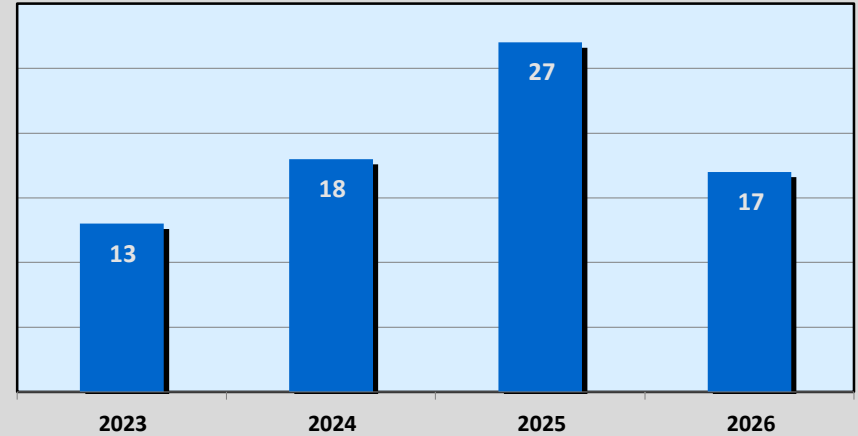


# DEPARTMENT HIGHLIGHTS

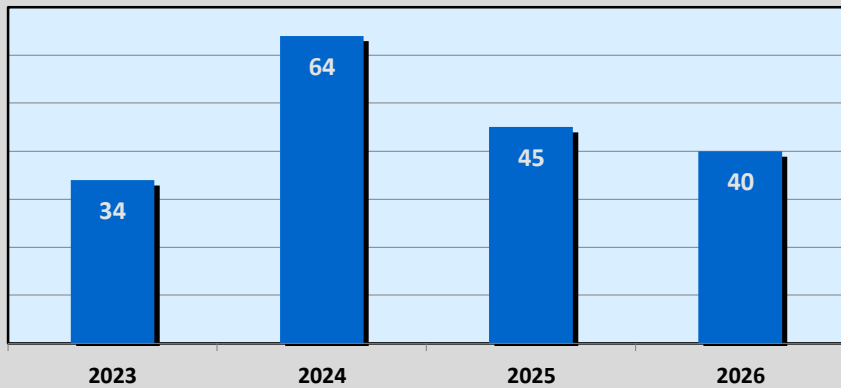
### May Theft Comparison



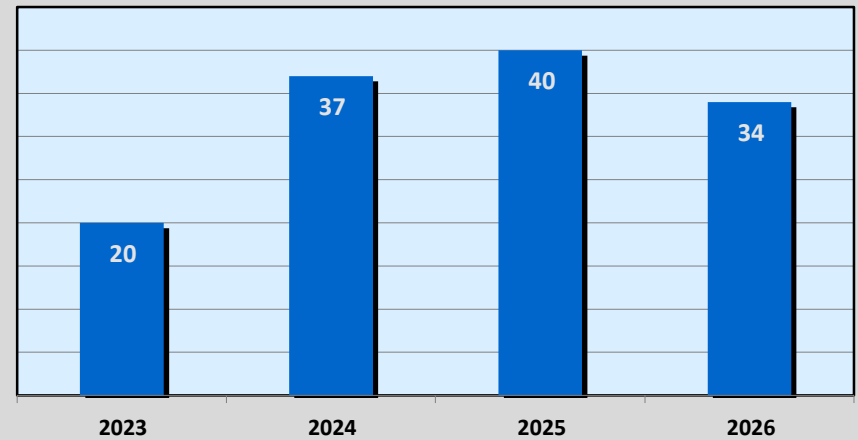
### May Assault Comparison



### May Domestic Calls for Service Comparison



### May Arrest Comparison

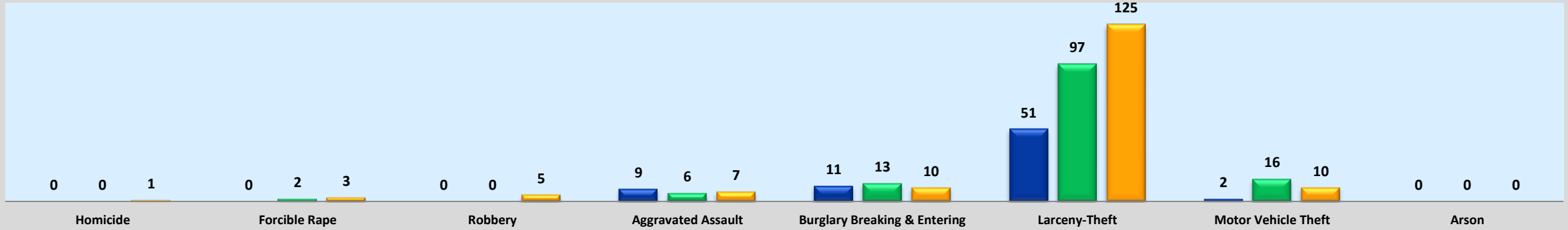


# DEPARTMENT HIGHLIGHTS

Year-to-Date  
May

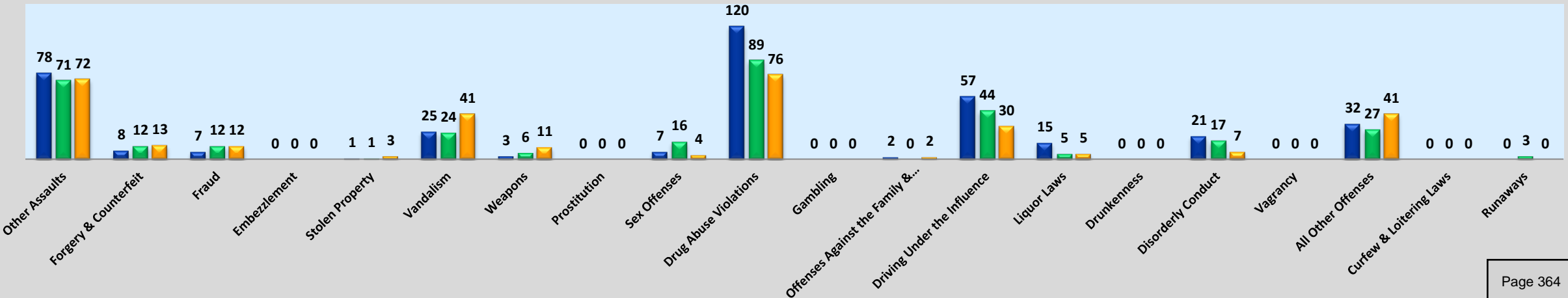
## Part I Crimes

■ 2026 ■ 2025 ■ 2024



## Part II Crimes

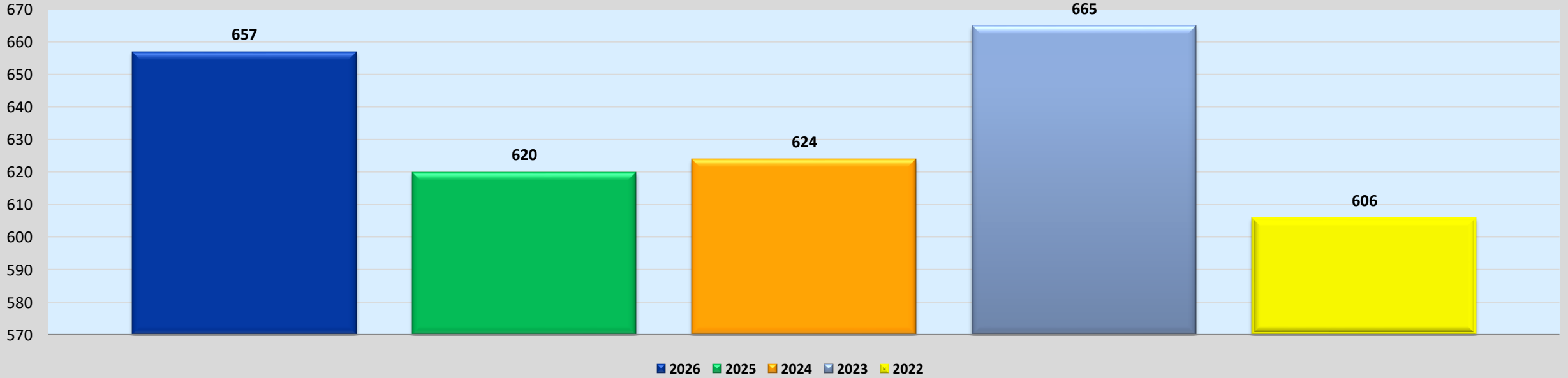
■ 2026 ■ 2025 ■ 2024



# DEPARTMENT HIGHLIGHTS

Year-to-Date  
May

## Collisions



## **Law Enforcement Advisory Committee**

- Proposal on False Alarms
- E-Bike Safety Concerns
  - Enforcement
  - Education
  - Reflective Vest
- Upcoming BPD Awards Ceremony
- S.A.F.E Team accomplishments
- Flock Camera usage

## **Meetings Attended by Chief Joseph Babkiewicz**

**Every Wednesday** – Senior Staff Communications Meeting

**Every Friday** – Men's Meeting @ Bible Missionary Baptist Church

**May 1st** – LEC Tour – T2 Teaching and Tutoring Group

**May 2<sup>nd</sup>** – Public Safety Recruiting Open House

**May 4<sup>th</sup>** – Executive Staff meeting

**May 4<sup>th</sup>** – Attend CIP meeting

**May 5<sup>th</sup>** – Attend Annual Tag & Bag with Hugaroo

**May 5<sup>th</sup>** – Command Staff meeting

**May 6<sup>th</sup>** – Lunch with Administrative Staff

**May 6<sup>th</sup>** – Cone Crazy Ice Cream Truck for Public Services Appreciation

**May 7<sup>th</sup>** – AXON Air/Drone Demo

**May 7<sup>th</sup>** – IT Task Review meeting

**May 7<sup>th</sup>** – Attend National Day of Prayer Event

**May 9<sup>th</sup>** – Old Town Mayfest

**May 11<sup>th</sup>** – Executive Staff meeting

**May 11<sup>th</sup>** – Lawsuit Discussion

**May 12<sup>th</sup>** – Command Staff Interview(s)

**May 12<sup>th</sup>** – Meeting with Brightview

**May 12<sup>th</sup>** – Awards Committee meeting

**May 12<sup>th</sup>** – Town Council meeting

**May 14<sup>th</sup>** – Meeting with Town Manager

**May 14<sup>th</sup>** – Meeting with Form Chief, Joey Reynolds

**May 14<sup>th</sup>** – Monthly Human Resource/Command Staff meeting

## **Meetings Attended by Chief Joseph Babkiewicz cont.**

- May 20<sup>th</sup>** – Town-Wide Hurricane Preparedness meeting
- May 20<sup>th</sup>** – Police Tech Grant meeting
- May 20<sup>th</sup>** – Meeting with Beaufort County School District Superintendent
- May 20<sup>th</sup>** – Awards Committee meeting
- May 20<sup>th</sup>** – Explorers Leadership Class
- May 20<sup>th</sup>** – Attend Mayor’s Service Awards
- May 21<sup>st</sup>** – IT Task Review meeting
- May 21<sup>st</sup>** – TC Budget Workshop
- May 26<sup>th</sup>** – Meeting with Mayor and Town Manager
- May 26<sup>th</sup>** – Mandatory Command Staff meeting
- May 26<sup>th</sup>** – Novant Health Ribbon Cutting Celebration
- May 26<sup>th</sup>** – Awards Committee meeting
- May 27<sup>th</sup>** – Attend Police Applicant PAT
- May 27<sup>th</sup>** – May Birthdays and Anniversaries Event
- May 27<sup>th</sup>** – Optical Solutions Ribbon Cutting Ceremony
- May 28<sup>th</sup>** – TC Budget Workshop
- May 29<sup>th</sup>** – Bluffton Police Annual Awards Ceremony

# DEPARTMENT HIGHLIGHTS

<b>Commendations -</b>	<b>None</b>
<b>Complaints -</b>	<b>None</b>

## Police Department Demographics as of May 31, 2026

DEPARTMENT	Black	Hispanic	Other	White	Grand Total
Female	2	2	1	17	22
Male	6	5	3	36	50
<b>Grand Total</b>	<b>8</b>	<b>7</b>	<b>4</b>	<b>53</b>	<b>72</b>

SWORN OFFICERS	Black	Hispanic	Other	White	Grand Total
Female	1			9	10
Male	5	5	3	33	46
<b>Grand Total</b>	<b>6</b>	<b>5</b>	<b>3</b>	<b>42</b>	<b>56</b>

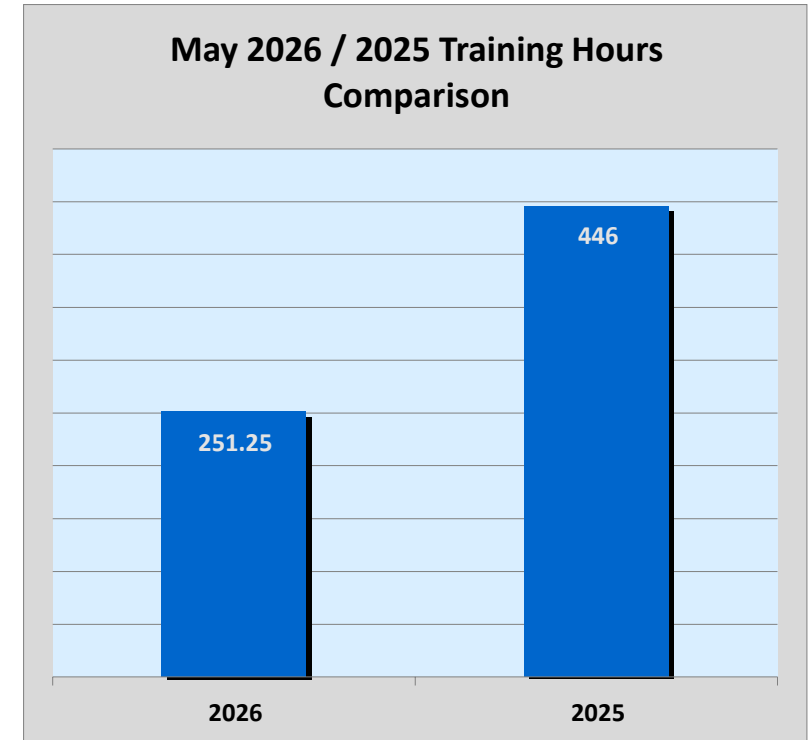
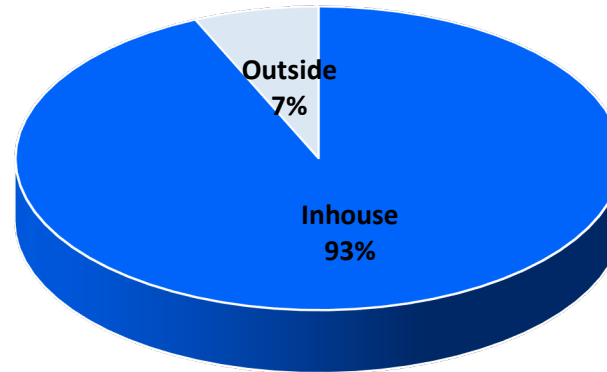
# May Officer Training

### In-House

- Officer Liability - 1 Officer
- Airborne and Bloodborne Pathogens - 1 Officer
- Legal Update 2026 - Part I - 6 Officers
- Bloodborne Pathogens for First Responders - 21 Officers
- Defensive Driving Basics - 18 Officers
- CDV - Annual DV 2024 - Back to Basics - 33 Officers
- Line Up 2026 - May-June - 41 Officers
- Line Up 2026 - March-April - 3 Officers
- Studio - Police/Dog Encounters - 1 Officer
- Bench to Badge series - 1 Officer
- Crowd Control - 1 Officers
- Dealing with Armed Suspects - 1 Officer
- Hazmat First Responder Awareness (Level 1) - 20 Officers
- Interacting with the Mental Ill as a First Responder - 1 Officer
- SafeWrap - 13 Officers

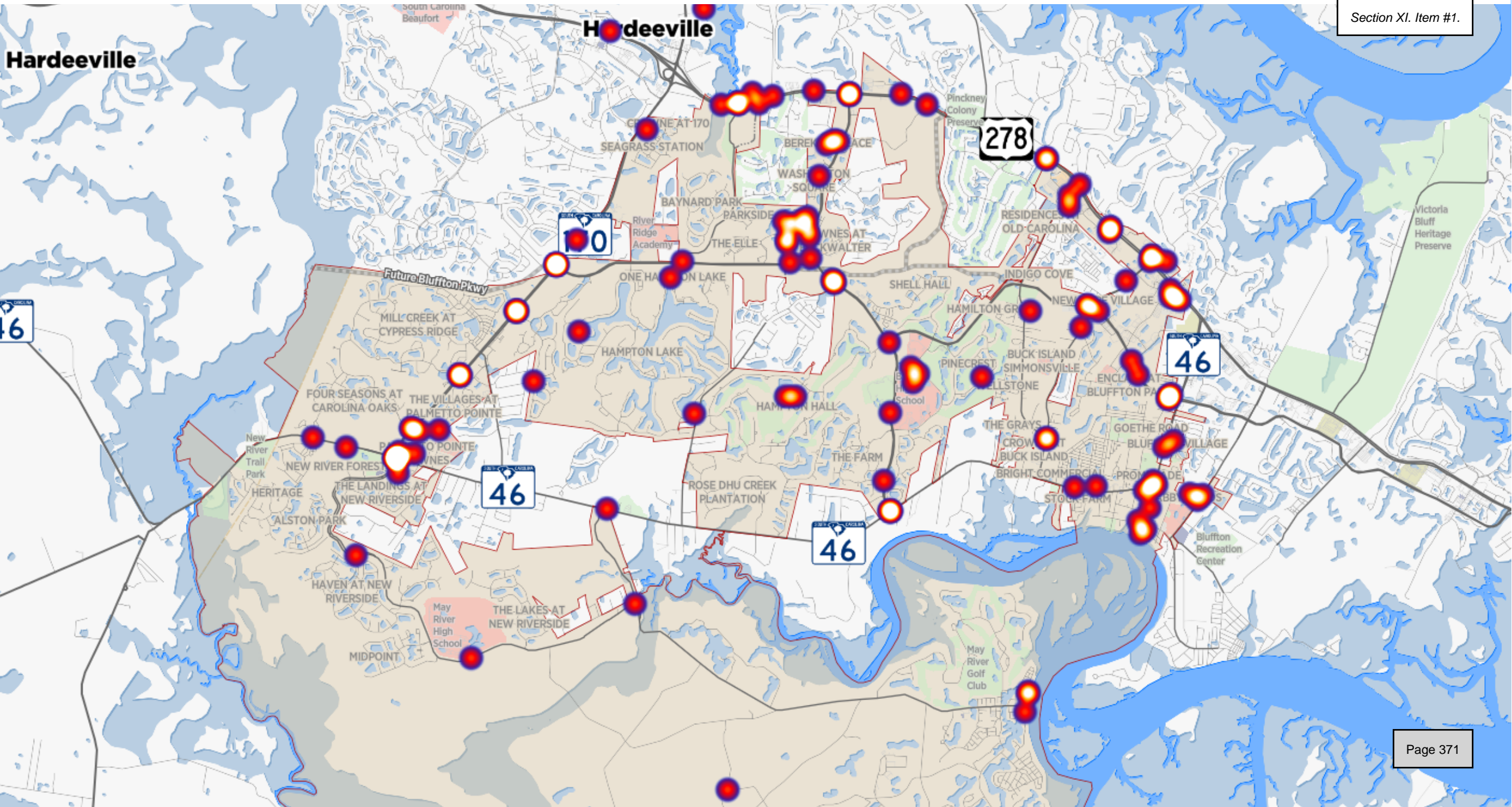
### Outside

- Firearms Instructor - 1 Officer



# COLLISIONS (135) May 2026

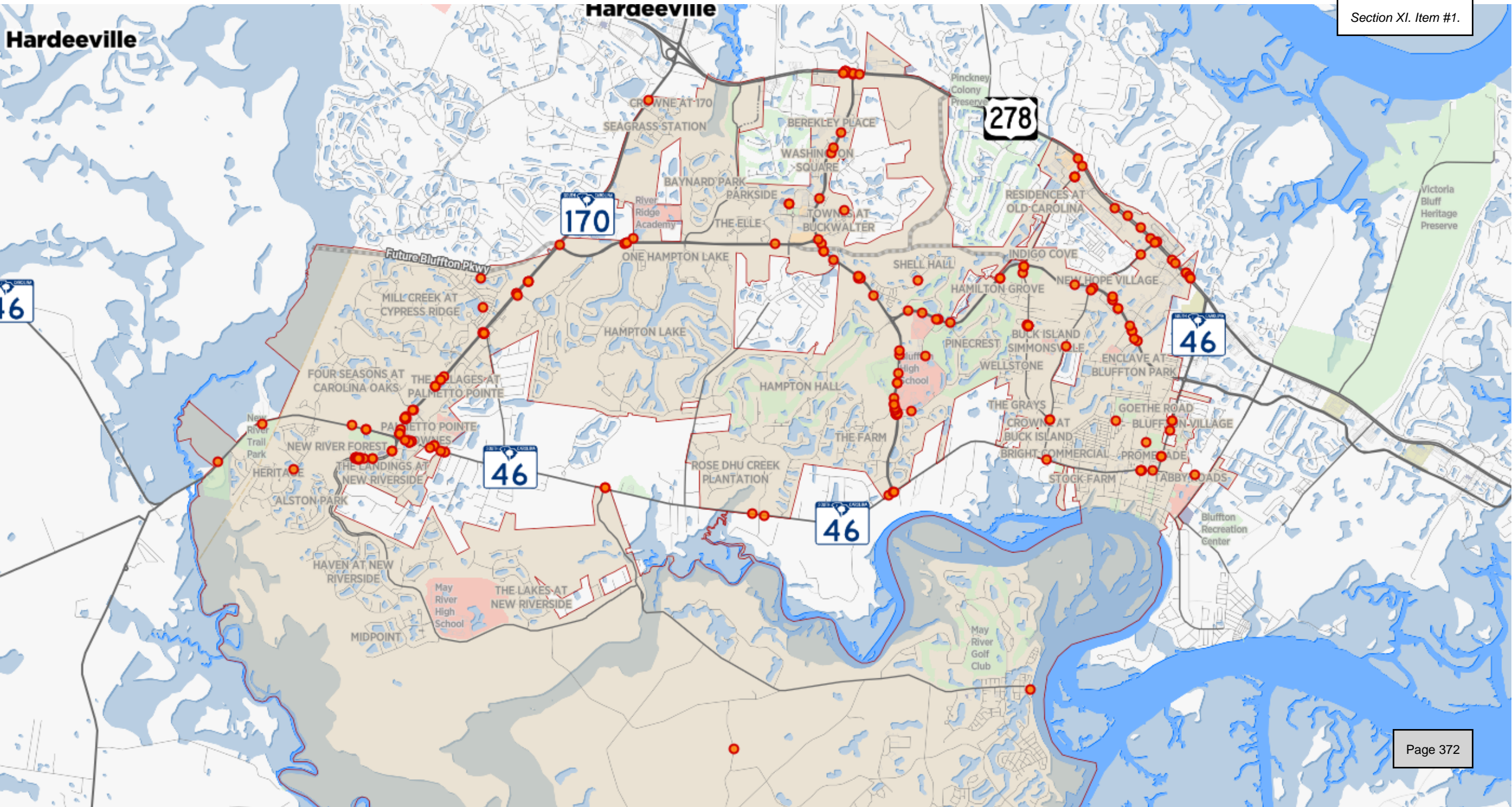
Section XI. Item #1.



Hardeeville

# CITATIONS ISSUED (209) May 2026

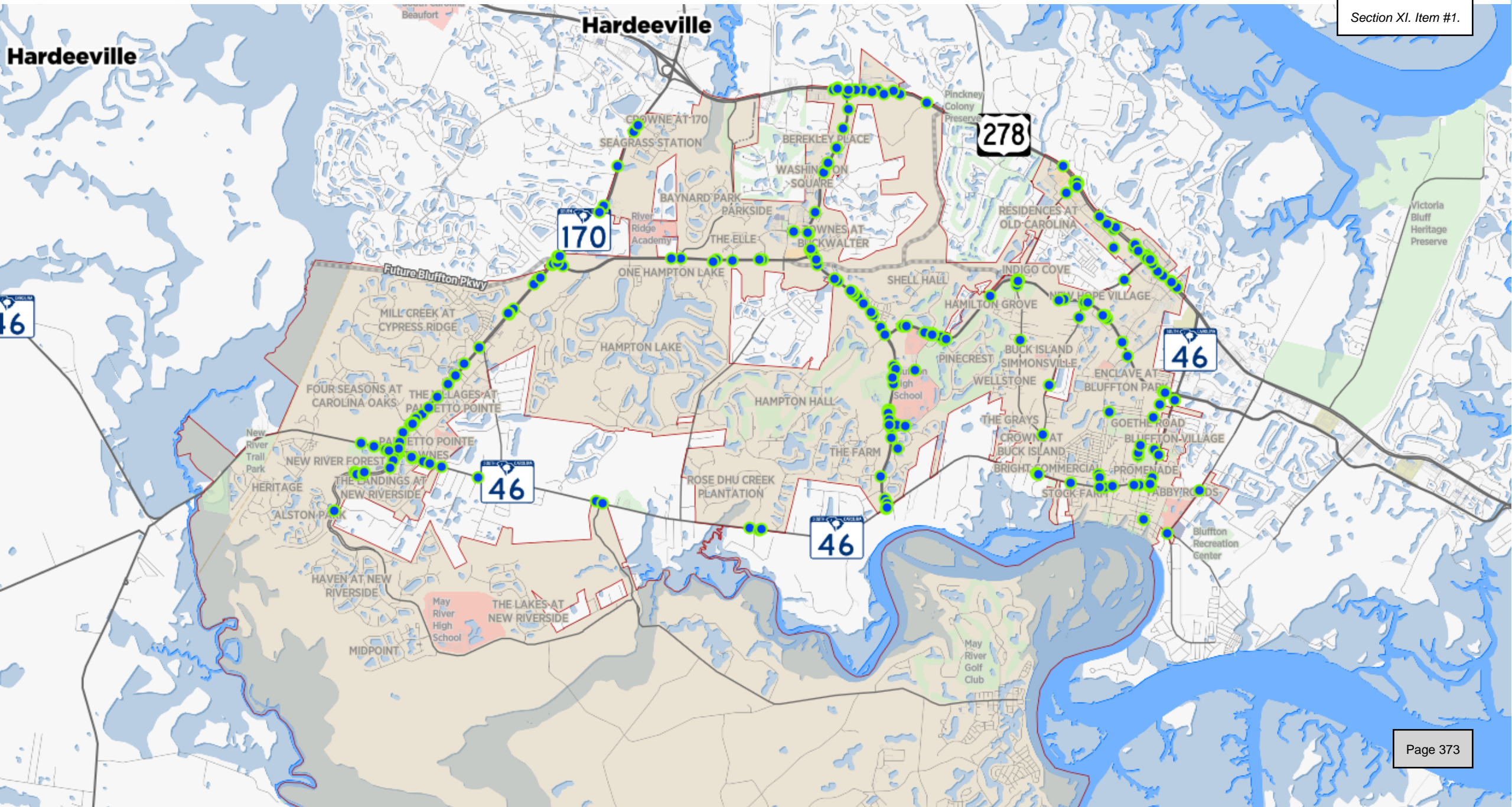
Section XI. Item #1.



Hardeeville

# WARNINGS ISSUED (300) May 2026

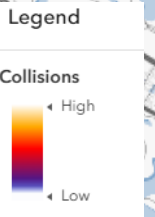
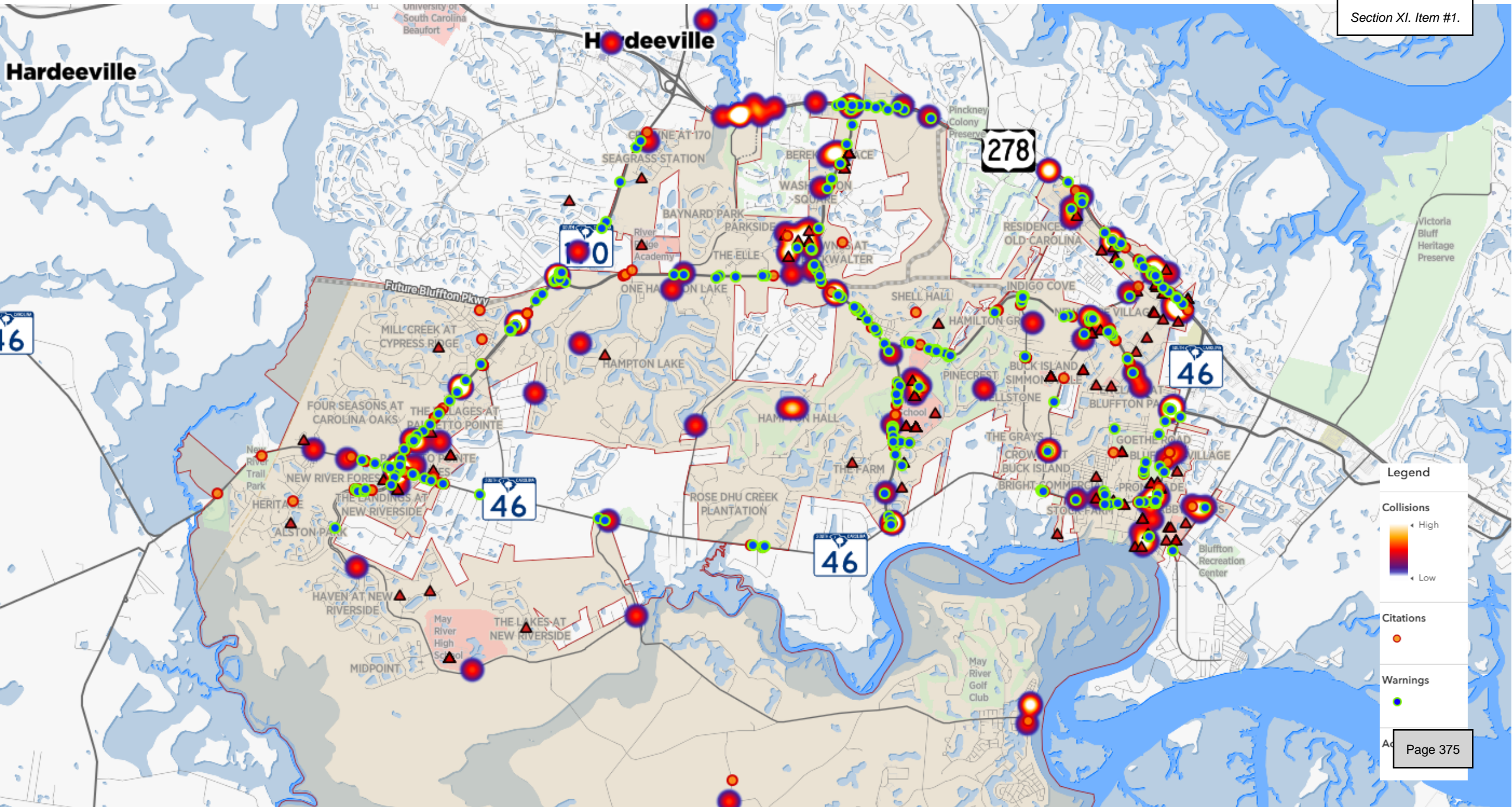
Section XI. Item #1.





# Collisions, Citations, Warnings and Activated Alarms – May 2026

Section XI. Item #1.



CALLS FOR SERVICE TOP 10 CALL TYPES	
Activated Alarm	182
Disturbance	116
911 Hang-Up	97
Case Follow Up	96
Reckless Driving	49
Assist Other	40
Noise Complaint	35
Assist Motorist	33
Hit & Run	27
Domestic	27

**TOTAL CALLS FOR SERVICE: 1144**

**AVERAGE PER DAY: 42**

PRO-ACTIVE PATROLS	
Extra Patrol - Business	2071
Traffic Stop	413
Extra Patrol - Residence	220
Traffic Enforcement	25

UNIFORM TRAFFIC CITATIONS TOP 10 VIOLATIONS	
Speeding; More than 15 but less than 25 MPH over the speed limit	41
Driving Without a SC License - 1st Offense	24
Driving Under Suspension; license not suspended for DUI	19
Operating Vehicle While License/Registration Expired	15
Failure to Maintain Proof of Insurance in Vehicle	11
Permitting or Operating Vehicle which is not Registered and Licensed	10
Speeding; Greater than 25 mph over the speed limit	10
Possession of 28g (1oz) or Less of Marijuana	10
Failure to Return License Plate and Registration upon loss of insurance	8
Speeding; more than 10 but less than 15 mph over the speed limit	6
Speeding; 10 mph or less over the speed limit	5

UNIFORM TRAFFIC WARNINGS TOP 10 VIOLATIONS	
Speeding	88
Defective Equipment	55
Changing Lanes Unlawfully	31
Vehicle License Violation	29
Improper Lane Use	26
Other	25
Disregarding Stop Sign	13
Contact Only	8
Following Too Close	6
Disregarding Traffic Signal	5

**TOTAL WARNINGS ISSUED: 300**  
**AVERAGE PER DAY: 11**

**TOTAL CITATIONS ISSUED: 209**  
**AVERAGE PER DAY: 8**

CRIMINAL INVESTIGATIONS	
<b>Cases Assigned</b>	<b>15</b>
<b>Incident Reports</b>	<b>4</b>
<b>Supplemental Reports</b>	<b>34</b>
<b>Cases Closed</b>	<b>10</b>
<b>Arrests Made</b>	<b>1</b>
<b>Arrest Warrants</b>	<b>2</b>
<b>Bond Court</b>	<b>4</b>
<b>Case Call Outs</b>	<b>4</b>
<b>Search Warrants</b>	<b>3</b>
<b>Prelims/Grand Jury</b>	<b>1</b>
<b>Family Court Petitions</b>	<b>0</b>

**Call-Outs**

1. 26BP19523 – Death Investigation
2. 26BP16516 – Violating an Order of Protection

**Mental Health Advocate:**

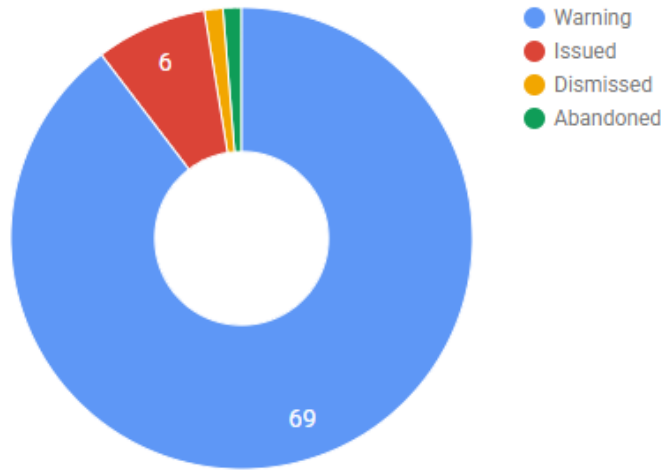
CIT: 0  
 Referrals: 6  
 Follow Ups: 35  
 Supplemental Reports: 16

**Victim Advocate:**

Case Call Outs: 0  
 Incident Reports: 1  
 Case Closed: 4  
 Bond Court: 3  
 Supplemental Reports: 5  
 ICAC Cases Assigned: 0  
 Total ICAC Cases: 8

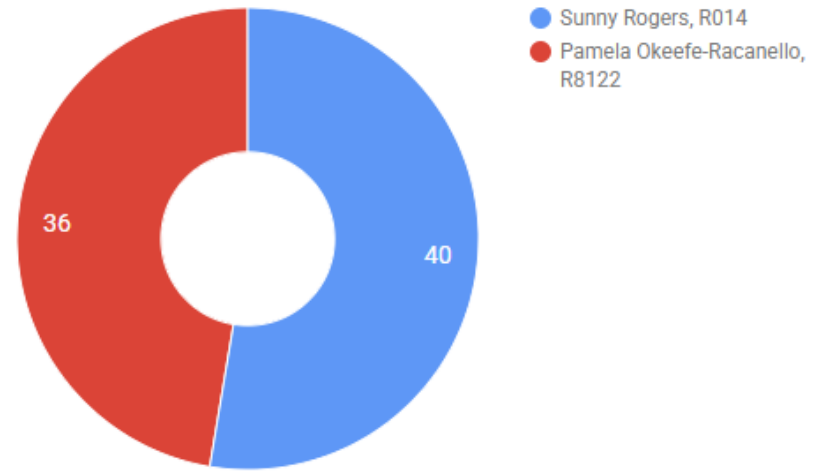
# COMMUNITY SERVICE ASSISTANTS

Tickets By Status Month To Date



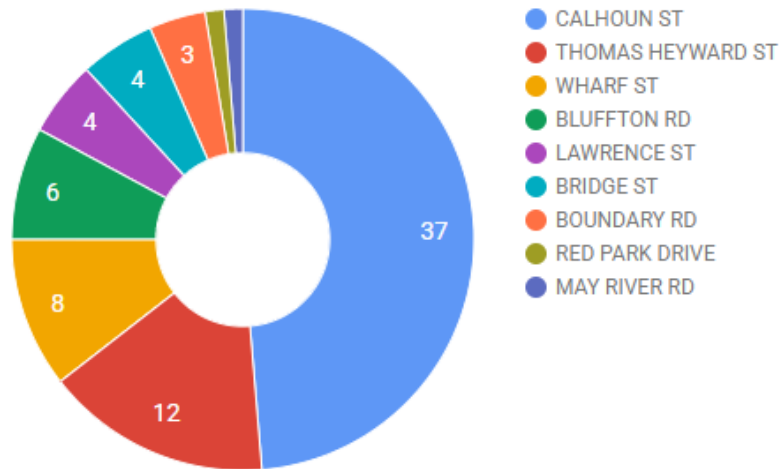
Total Count: 77 As of 5/27/2026, 12:00:00 AM

Tickets By Officer Month To Date



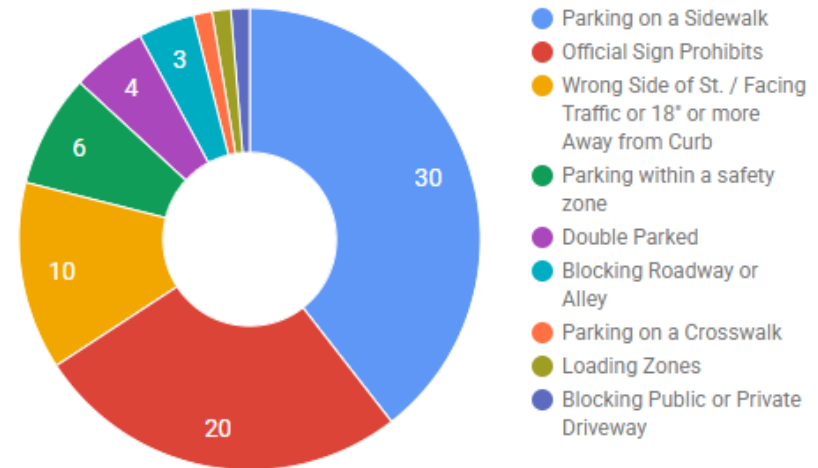
Total Count: 76 As of 5/27/2026, 12:00:00 AM

Tickets By Location Month To Date



Total Count: 76 As of 5/27/2026, 12:00:00 AM

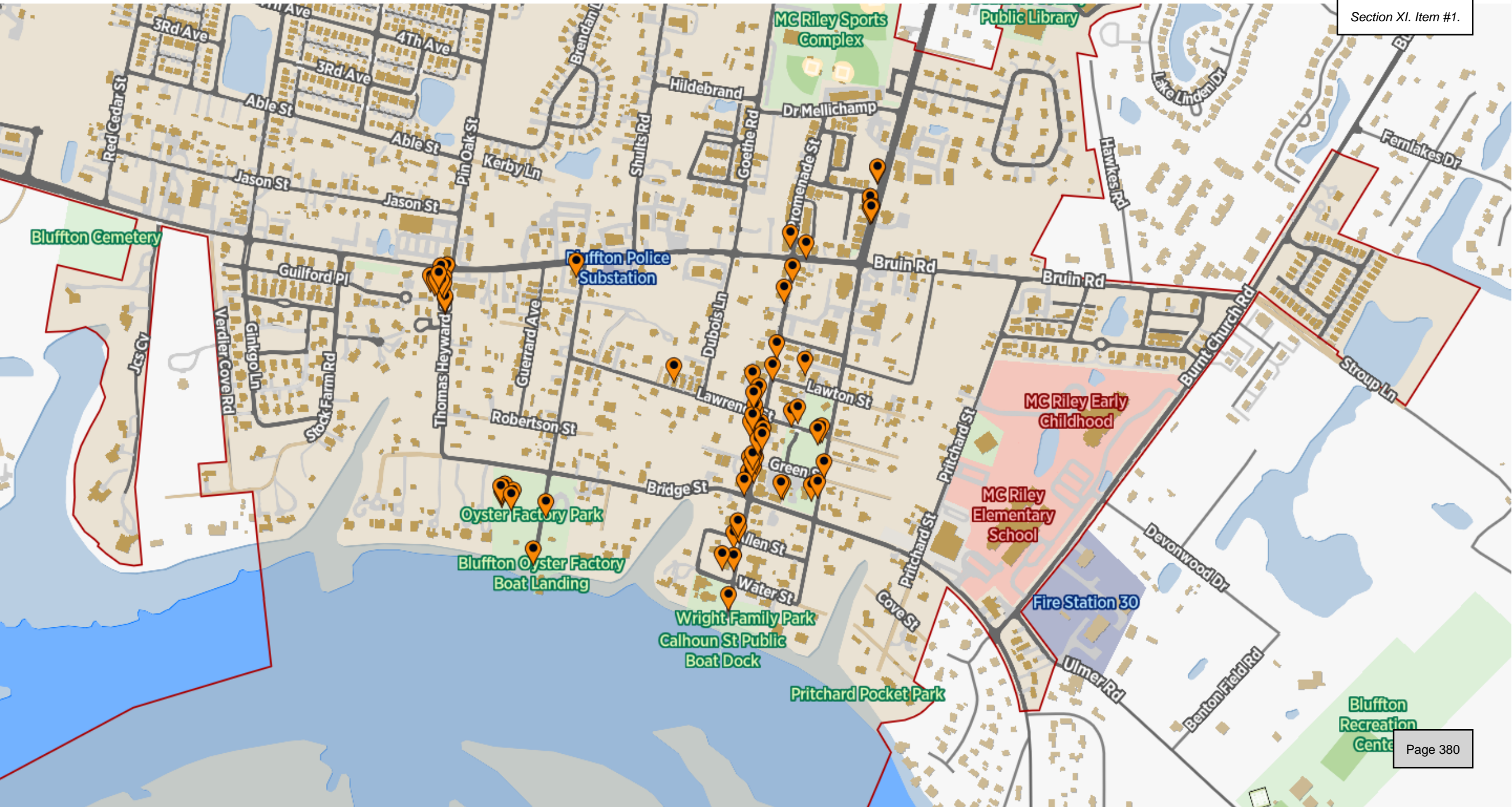
Tickets By Violation Month To Date



Total Count: 76 As of 5/27/2026, 12:00:00 AM

# DOWNTOWN CITATIONS (77) – May 2026

Section XI. Item #1.



## **Code Enforcement:**

William Bonhag

- 8 Notices of Violation were issued this month.

\*Note: Jason Lee FD investigator along with Matt Kazmierczak Inspector Dept of Agriculture joined forces with Codes to stop vehicles from selling/serving foods and products from the back of their vans and cars, these actions are being continued as we find them at construction sites throughout Bluffton.

## **Complaints / Property Checks / Follow-ups / Ordinance Letters**

### **218 Simmonsville Road**

- 3/14/24 Due to several violations, this location was boarded up.
- Property cleaned up, now pending information from Vicky Smalls and Rob Currall Building Official as to their next move regarding this structure.
- 12/26/25 This property is Heirs property, until this property is settled in court no actions can move forward.
- The son Johnny Mitchell is working with Vicky Smalls to secure ownership to obtain permits to fix the house in its entirety. This was discussed on a site visit on Tuesday 5-4-26. Johnny has already cleaned the back area and emptied the house of all contents.

### **214 Simmonsville Road**

- On Thursday 2/5/26 , Jason Wagner contacted us regarding burning at this location by a landscape company and the residents, leading to extreme smoke resulting in his daughter requiring a breathing treatment prior to waiting for her bus.
- This is the second time we have been visiting for burning along with NO BL for any operations.
- Pending re-check on the site. Owner was given until June 1st to relocate his business.
- The business is moving to Ridgeland with its equipment and will be having an office on the promenade.

### **269 Buck Island**

- This location has been an ongoing matter with Moctezuma Landscaping that has BL for 709 Shady Pine Lane address, NOT this area as its residential only.
- On 4-2-26, Moctezuma was issued 2x NOV, one for no BL and the other for accumulations on property NO DUMPING, Compliance date is set for June 1st relocating to commercial property for all equipment.

## Code Enforcement continued:

### 11 Oliver Court – Mid Guard Storage Facility

- Complaint was received on Tuesday 5-12-26 from Rick Stezer pertaining to infestation of rodent urine and feces, along with dead rats and mice in his unit 2033,2034,2036 in building 11A.
- Fire investigator Jason Lee and I visited the location to check out the status of this complaint only to find exactly what Mr. Stezer stated as we put on masks and gloves for protection.
- Codes issued NOV for Sec.12-25 (a) Public Health Nuisances, declaration, offensive acts or conditions.
- FD issued an NOV as well with compliance by 5-21-26.
- We have been following up with the VP for the company and the Regional Manager on site.
- They have hired a professional company to come clean and disinfect all of their buildings, especially these units mentioned.
- We will continue to visit until this matter is resolved to our liking according to codes.
- Jason Lee FD checked for compliance and a cleaning company out of NY were on site cleaning, Thursday 5-28-26

S.A.F.E Team	
Attended Bluffton Farmer's Market	-
Attended Low Country Church Student Ministry	<b>CONDUCTED TRAFFIC ENFORCEMENT AREAS:</b>
Attended Hilton Head Christian Academy Field Day	<i>Hwy 278/Fording Island Road</i>
Attended Town Budget Workshop	<i>May River Rd</i>
Attended Baby Beluga Musical Play @ May River Montessori	<i>Burnt Church Road</i>
Attended Town Council Meeting	<i>Okatie Highway 170/Traffic Circle</i>
	<i>Buckwalter Parkway</i>
	<i>New Riverside</i>
	<i>Bluffton Parkway</i>
	<i>Bluffton Park</i>
	<i>Bluffton School Zones @ dismissal</i>

TRAFFIC STATS:	
Traffic Stops	162
Tickets:	123
Warnings:	89
Warrants:	6
Incident Reports:	17
Arrest:	12
Transport:	0
Drugs	2

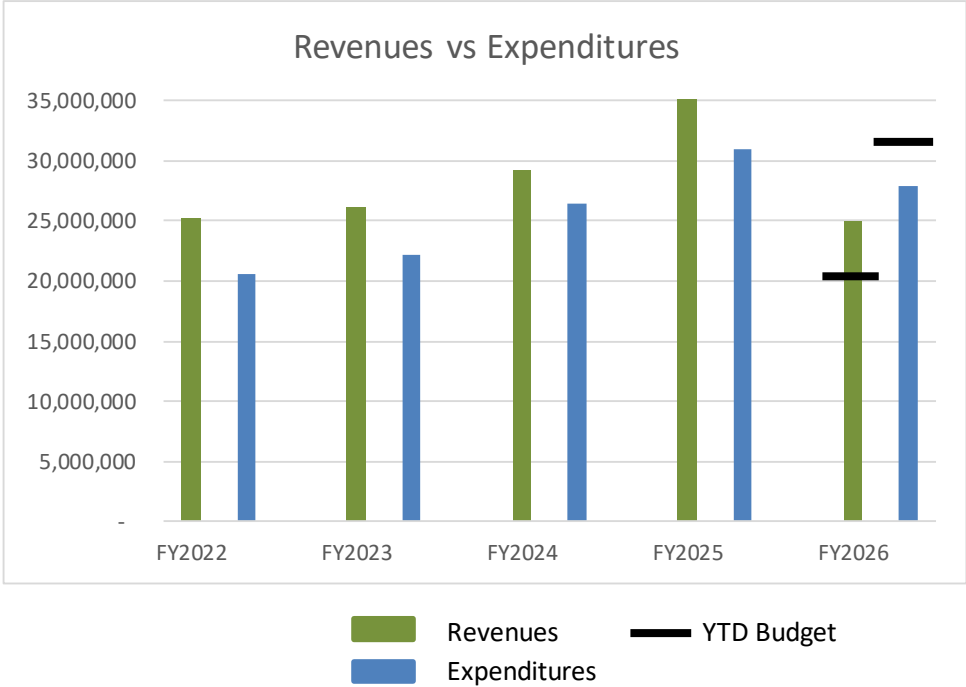
**TOWN COUNCIL  
STAFF REPORT  
Finance & Administration Department**



<b>MEETING DATE:</b>	June 09, 2026
<b>PROJECT:</b>	Consent Agenda: Year-to-date Financial Report
<b>PROJECT MANAGER:</b>	Natalie Majorkiewicz, CGFO, CGFM, 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 FY2026 year-to-date (YTD) through April 2026. Revenues have been higher than expenditures for the last four full years.



FY2026 YTD through April shows General Fund total revenues above the total budgeted amount. Building Safety Permits and Grants & Entitlements are showing the largest impact for the fiscal year. Total expenditures for April are below the total budget for all departments

**FY26 General Fund Financial Overview**

Revenues		Expenditures
\$25,001k	<i>YTD</i>	\$27,920k
122.6%	<i>% of Budget</i>	86.2%
\$20,386k	<i>YTD Budget</i>	\$32,402k

**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
8. Community Foundation of the Lowcountry Fund Balances



**Town of Bluffton**  
**Actual Versus Budget**  
**For Period Ending April 30, 2026**

	Month of April 2026					Year-to-Date through April 30, 2026				
	FY 2025	FY 2026	More/(Less)	Budget	Over / (Under)	FY 2025	FY 2026	More/(Less)	Budget	Over / (Under)
<b>Revenues</b>										
<b>Property Taxes</b>	\$ 402,492	\$ 474,726	\$ 72,234	\$ 228,223	\$ 246,503	\$ 10,393,196	\$ 11,480,487	\$ 1,087,291	\$ 10,894,235	\$ 586,252
<b>Licenses &amp; Permits</b>										
Business Licenses	2,095,331	1,919,824	(175,507)	1,754,516	165,308	4,362,000	4,357,457	(4,543)	3,583,065	774,392
MASC Telecommunications	-	-	-	-	-	48,625	43,581	(5,044)	47,501	(3,920)
MASC Insurance Tax Collection	54,728	94,552	39,824	47,685	46,867	71,281	97,004	25,723	62,108	34,896
Franchise Fees	103,820	72,606	(31,214)	93,335	(20,729)	1,325,376	1,375,893	50,517	1,191,526	184,367
Building Safety Permits	1,047,885	295,554	(752,331)	242,732	52,822	3,721,958	3,088,388	(633,570)	1,456,512	1,631,876
Application Fees	8,425	6,800	(1,625)	5,045	1,755	82,605	64,675	(17,930)	49,464	15,211
Total Licenses & Permits	3,310,189	2,389,336	(920,853)	2,143,313	246,023	9,611,845	9,026,998	(584,847)	6,390,176	2,636,822
<b>Grants and Entitlements</b>	222,880	500,000	277,120	176,675	323,325	1,163,879	2,279,158	1,115,279	707,000	1,572,158
<b>Intergovernmental</b>	-	-	-	-	-	325,559	307,273	(18,286)	484,688	(177,415)
<b>Service Revenues</b>	224,161	119,355	(104,806)	150,001	(30,646)	930,681	779,756	(150,925)	629,794	149,962
<b>Fines &amp; Fees</b>	9,854	16,206	6,352	9,805	6,401	96,387	143,770	47,383	95,921	47,849
<b>Interest Income</b>	151,221	37,078	(114,143)	51,143	(14,065)	790,992	539,690	(251,302)	267,516	272,174
<b>Miscellaneous Revenues</b>	19,927	29,918	9,991	70,044	(40,126)	490,814	254,593	(236,221)	619,238	(364,645)
<b>Total Revenues</b>	4,340,724	3,566,619	(774,105)	2,829,204	737,415	23,803,353	24,811,725	1,008,372	20,088,568	4,723,157
<b>Other Financing Sources</b>	-	-	-	-	-	10,400	-	(10,400)	-	-
<b>Transfers In</b>	-	-	-	-	-	175,201	189,701	14,500	297,393	(107,692)
<b>Total Other Financing Sources &amp; Transfers In</b>	-	-	-	-	-	185,601	189,701	4,100	297,393	(107,692)
<b>Total Revenues and Other Financing Sources</b>	\$ 4,340,724	\$ 3,566,619	\$ (774,105)	\$ 2,829,204	\$ 737,415	\$ 23,988,954	\$ 25,001,426	\$ 1,012,472	\$ 20,385,961	\$ 4,615,465
<b>Expenditures</b>										
Building Safety	\$ 67,133	\$ 66,125	\$ (1,008)	\$ 77,302	\$ (11,177)	\$ 755,606	\$ 583,454	\$ (172,152)	\$ 671,830	\$ (88,376)
Communications	66,797	37,747	(29,050)	39,968	(2,221)	595,677	332,533	(263,144)	356,427	(23,894)
Customer Service	19,327	17,471	(1,856)	21,752	(4,281)	200,938	175,893	(25,045)	226,152	(50,259)
Economic Development	33,298	34,489	1,191	33,298	1,191	413,376	401,178	(12,198)	413,376	(12,198)
Events & Venues	-	52,188	52,188	68,605	(16,417)	-	501,973	501,973	677,473	(175,500)
Executive	127,375	148,659	21,284	142,968	5,691	1,353,722	1,493,767	140,045	1,676,626	(182,859)
Finance & Administration	86,385	89,722	3,337	101,518	(11,796)	920,095	1,025,116	105,021	1,204,698	(179,582)
Human Resources	47,428	56,275	8,847	56,356	(81)	474,210	562,877	88,667	668,836	(105,959)
Information Technology	85,945	117,369	31,424	103,029	14,340	1,607,690	1,794,567	186,877	2,151,294	(356,727)
Municipal Court	32,754	38,640	5,886	34,203	4,437	413,763	401,224	(12,539)	418,972	(17,748)
Municipal Judges	8,217	8,292	75	8,491	(199)	84,550	83,661	(889)	86,452	(2,791)
Planning & Community Development	123,767	191,519	67,752	150,056	41,463	1,105,262	1,286,354	181,092	1,559,586	(273,232)
Police	927,113	835,066	(92,047)	1,109,726	(274,660)	8,142,403	8,567,979	425,576	10,031,773	(1,463,794)
Project Management	63,504	61,744	(1,760)	70,365	(8,621)	626,010	628,024	2,014	695,878	(67,854)
Public Services	216,619	254,740	38,121	269,032	(14,292)	2,231,850	2,410,296	178,446	2,993,493	(583,197)
Town Council	11,349	72,372	61,023	19,259	53,113	112,633	205,243	92,610	348,291	(143,048)
Town Wide	225,799	222,190	(3,609)	280,573	(58,383)	2,647,806	3,115,326	467,520	3,871,032	(755,706)
<b>Total Expenditures</b>	2,142,810	2,304,608	161,798	2,586,501	(281,893)	21,685,591	23,569,465	1,883,874	28,052,189	(4,482,724)
<b>Other Financing Uses</b>										
Contribution to Fund Balance	-	-	-	-	-	-	-	-	-	-
Transfers Out to Capital Improvements Program Fund	-	-	-	-	-	-	4,350,000	4,350,000	4,350,000	-
<b>Total Transfers</b>	-	-	-	-	-	-	4,350,000	4,350,000	4,350,000	-
<b>Total Expenditures and Other Financing Uses</b>	\$ 2,142,810	\$ 2,304,608	\$ 161,798	\$ 2,586,501	\$ (281,893)	\$ 21,685,591	\$ 27,919,465	\$ 6,233,874	\$ 32,402,189	\$ (4,482,724)



**Town of Bluffton  
Actual Versus Budget  
For Period Ending April 30, 2026**

	Month of April 2026					Year-to-Date through April 30, 2026				
	FY 2025	FY 2026	More/(Less)	Budget	Over / (Under)	FY 2025	FY 2026	More/(Less)	Budget	Over / (Under)
<b>Revenues</b>										
<b>Stormwater Utility Fee</b>	\$ 41,456	\$ 23,270	\$ (18,186)	\$ 37,830	\$ (14,560)	\$ 2,451,176	\$ 2,385,220	\$ (65,956)	\$ 2,236,760	\$ 148,460
<b>Licenses &amp; Permits</b>										
NPDES Plan Review Fee	12,600	8,400	(4,200)	13,549	(5,149)	80,448	66,661	(13,787)	86,505	(19,844)
NPDES Inspection Fee	24,150	12,100	(12,050)	21,692	(9,592)	289,300	453,407	164,107	259,850	193,557
Total Licenses & Permits	36,750	20,500	(16,250)	35,240	(14,740)	369,748	520,068	150,320	346,355	173,713
<b>Interest Income</b>	4,515	3,345	(1,170)	-	3,345	50,706	37,541	(13,165)	-	37,541
<b>Total Revenues</b>	<u>82,721</u>	<u>47,115</u>	<u>(35,606)</u>	<u>73,070</u>	<u>(25,955)</u>	<u>2,871,630</u>	<u>2,942,829</u>	<u>71,199</u>	<u>2,583,115</u>	<u>359,714</u>
<b>Other Financing Sources</b>										
Transfers In	-	-	-	-	-	-	-	-	-	-
<b>Total Other Financing Sources &amp; Transfers In</b>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
<b>Total Revenues and Other Financing Sources</b>	<u>\$ 82,721</u>	<u>\$ 47,115</u>	<u>\$ (35,606)</u>	<u>\$ 73,070</u>	<u>\$ (25,955)</u>	<u>\$ 2,871,630</u>	<u>\$ 2,942,829</u>	<u>\$ 71,199</u>	<u>\$ 2,583,115</u>	<u>\$ 359,714</u>
<b>Expenditures</b>										
Watershed Management	\$ 100,573	\$ 128,728	\$ 28,155	\$ 285,717	\$ (156,989)	\$ 1,114,528	\$ 1,746,144	\$ 631,616	\$ 3,166,253	\$ (1,420,109)
<b>Total Expenditures</b>	<u>100,573</u>	<u>128,728</u>	<u>28,155</u>	<u>285,717</u>	<u>(156,989)</u>	<u>1,114,528</u>	<u>1,746,144</u>	<u>631,616</u>	<u>3,166,253</u>	<u>(1,420,109)</u>
<b>Other Financing Uses</b>										
Transfers Out to Capital Improvements Program Fund	-	-	-	-	-	-	-	-	-	-
Transfers Out to General Fund	-	-	-	-	-	-	-	-	-	-
Transfer Out to Debt Service	-	-	-	-	-	65,525	61,400	(4,125)	64,806	(3,406)
Contribution to Fund Balance	-	-	-	-	-	-	-	-	-	-
<b>Total Transfers</b>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>65,525</u>	<u>61,400</u>	<u>(4,125)</u>	<u>64,806</u>	<u>(3,406)</u>
<b>Total Expenditures and Other Financing Uses</b>	<u>\$ 100,573</u>	<u>\$ 128,728</u>	<u>\$ 28,155</u>	<u>\$ 285,717</u>	<u>\$ (156,989)</u>	<u>\$ 1,180,053</u>	<u>\$ 1,807,544</u>	<u>\$ 627,491</u>	<u>\$ 3,231,059</u>	<u>\$ (1,423,515)</u>



**Town of Bluffton  
Actual Versus Budget  
For Period Ending April 30, 2026**

Section XI. Item #1.

	Month of April 2026					Year-to-Date through April 30, 2026				
	FY 2025	FY 2026	More/(Less)	Budget	Over / (Under)	FY 2025	FY 2026	More/(Less)	Budget	Over / (Under)
<b>Revenues</b>										
<b>Property Taxes</b>										
Real & Personal Property Tax (TIF)	\$ 38,379	\$ 36,120	\$ (2,259)	\$ 37,500	\$ (1,380)	\$ 4,812,726	\$ 5,287,430	\$ 474,704	\$ 4,702,440	\$ 584,990
GO Bond Debt Service Property Tax	11,147	14,109	2,962	11,710	2,399	527,464	588,576	61,112	554,083	34,493
<b>Total Property Tax</b>	<b>49,526</b>	<b>50,229</b>	<b>703</b>	<b>49,209</b>	<b>1,020</b>	<b>5,340,190</b>	<b>5,876,006</b>	<b>535,816</b>	<b>5,256,523</b>	<b>619,483</b>
<b>Licenses &amp; Permits</b>										
Municipal Improvement District Fee	1,050	2,400	1,350	1,039	1,361	392,399	412,414	20,015	388,225	24,189
<b>Interest Income</b>	<b>4,169</b>	<b>1,937</b>	<b>(2,232)</b>	<b>2,690</b>	<b>(753)</b>	<b>73,271</b>	<b>24,874</b>	<b>(48,397)</b>	<b>47,272</b>	<b>(22,398)</b>
<b>Total Revenues</b>	<b>54,745</b>	<b>54,566</b>	<b>(179)</b>	<b>52,938</b>	<b>1,628</b>	<b>5,805,860</b>	<b>6,313,294</b>	<b>507,434</b>	<b>5,692,020</b>	<b>621,274</b>
<b>Other Financing Sources</b>										
Transfers In	-	-	-	-	-	65,525	61,400	(4,125)	61,400	-
<b>Total Other Financing Sources &amp; Transfers In</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>65,525</b>	<b>61,400</b>	<b>(4,125)</b>	<b>61,400</b>	<b>-</b>
<b>Total Revenues and Other Financing Sources</b>	<b>\$ 54,745</b>	<b>\$ 54,566</b>	<b>\$ (179)</b>	<b>\$ 52,938</b>	<b>\$ 1,628</b>	<b>\$ 5,871,385</b>	<b>\$ 6,374,694</b>	<b>\$ 503,309</b>	<b>\$ 5,753,420</b>	<b>\$ 621,274</b>
<b>Expenditures</b>										
<b>Series 2014 TIF Bonds Debt Service</b>										
Principal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 896,386	\$ 919,815	\$ 23,429	\$ 919,815	\$ -
Interest	-	-	-	-	-	23,429	11,866	(11,563)	11,866	-
<b>Series 2022 TIF Bonds Debt Service</b>										
Principal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Interest	-	-	-	-	-	-	-	-	-	-
<b>Series 2020 GO Bonds Debt Service</b>										
Principal	-	-	-	-	-	255,000	270,000	15,000	270,000	-
Interest	-	-	-	-	-	122,050	109,300	(12,750)	109,300	-
<b>Series 2020A GO Bonds Debt Service</b>										
Principal	-	-	-	-	-	-	-	-	-	-
Interest	-	-	-	-	-	65,525	61,400	(4,125)	61,400	-
<b>Miscellaneous</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total Expenditures</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>1,362,390</b>	<b>1,372,381</b>	<b>9,991</b>	<b>1,372,381</b>	<b>-</b>
<b>Other Financing Uses</b>										
Transfers Out to Capital Improvements Program Fund	-	-	-	-	-	3,650,000	3,063,566	(586,434)	3,063,566	-
<b>Total Transfers</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>3,650,000</b>	<b>3,063,566</b>	<b>(586,434)</b>	<b>3,063,566</b>	<b>-</b>
<b>Total Expenditures and Other Financing Uses</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 5,012,390</b>	<b>\$ 4,435,947</b>	<b>\$ (576,443)</b>	<b>\$ 4,435,947</b>	<b>\$ -</b>



**Town of Bluffton**  
**Budget and Actual - Capital Improvement Program Fund**  
**For Period Ending April 30, 2026**

	YTD Estimated	Adopted Budget	Budget Amendments and Transfers	Revised Budget	Actual vs Budget Difference	Actual as % of Budget
<b>Economic Development</b>						
Buckwalter Place Multi-County Commerce Park Phase 2	\$ 114,979	\$ 1,514,455	(505,391)	\$ 1,009,064	\$ 894,085	11.4%
<b>Total Economic Development</b>	<b>114,979</b>	<b>1,514,455</b>	<b>(505,391)</b>	<b>1,009,064</b>	<b>894,085</b>	<b>11.4%</b>
<b>Facilities</b>						
Town Hall Improvements	11,971	-	14,380	14,380	2,409	83.2%
Squire Pope Carriage House	42,386	-	51,805	51,805	9,419	81.8%
Law Enforcement Center Facility Improvements	-	195,000	(36,076)	158,924	158,924	0.0%
Sarah Riley Hooks Cottage	801,556	1,162,350	435,401	1,597,751	796,195	50.2%
Town Facilities ADA Compliance Plan	-	100,000	-	100,000	100,000	0.0%
New Riverside Barn Park Event Lawn Pavilion - NEW	1,017,256	111,500	960,000	1,071,500	54,244	94.9%
New Riverside Barn Park Public Service Building - NEW	16,811	99,000	-	99,000	82,189	17.0%
Public Service Building Expansion & Watershed Facility - NEW	4,700	201,000	-	201,000	196,300	2.3%
Oscar Frazer Park Pavilion - NEW	12,790	-	195,000	195,000	182,210	6.6%
<b>Total Facilities</b>	<b>1,907,470</b>	<b>1,868,850</b>	<b>1,620,510</b>	<b>3,489,360</b>	<b>1,581,890</b>	<b>54.7%</b>
<b>Housing</b>						
Affordable Housing Project	486,059	740,816	489,580	1,230,396	744,337	39.5%
<b>Total Housing</b>	<b>486,059</b>	<b>740,816</b>	<b>489,580</b>	<b>1,230,396</b>	<b>744,337</b>	<b>39.5%</b>
<b>Information Technology Infrastructure</b>						
Community Safety Cameras Phase 6	18,857	139,200	-	139,200	120,343	13.5%
Network Improvements	21,109	35,000	26,712	61,712	40,603	34.2%
<b>Total Parks</b>	<b>39,966</b>	<b>174,200</b>	<b>26,712</b>	<b>200,912</b>	<b>160,946</b>	<b>19.9%</b>
<b>Land</b>						
Land Acquisition	7,913,375	9,709,302	3,960,000	13,669,302	5,755,927	57.9%
<b>Total Land</b>	<b>7,913,375</b>	<b>9,709,302</b>	<b>3,960,000</b>	<b>13,669,302</b>	<b>5,755,927</b>	<b>57.9%</b>
<b>Parks</b>						
Park Improvements	104,054	60,000	65,000	125,000	20,946	83.2%
Oyster Factory Park	260,940	973,502	-	973,502	712,562	26.8%
New Riverside Park/Barn Site	796,716	2,142,000	(1,322,399)	819,601	22,885	97.2%
New River Trail	1,380,325	3,661,787	1,247,733	4,909,520	3,529,195	28.1%
Buckwalter Place Park Improvements	776,165	1,350,859	91,585	1,442,444	666,279	53.8%
Buck Island - Simmonsville Neighborhood Park - NEW	1,209	198,500	-	198,500	197,291	0.6%
Public Art	75,916	100,000	141,440	241,440	165,524	31.4%
New Riverside Barn Park Phase 2 Trail & Disc Golf - NEW	31,497	135,000	-	135,000	103,503	23.3%
<b>Total Parks</b>	<b>3,426,822</b>	<b>8,621,648</b>	<b>223,359</b>	<b>8,845,007</b>	<b>5,418,185</b>	<b>38.7%</b>
<b>Roads</b>						
Pathway Pedestrian Safety Improvements	324,391	460,235	115,182	575,417	251,026	56.4%
Calhoun Street Streetscape	52,900	427,230	89,593	516,823	463,923	10.2%
Wharf Street Lighting	139,802	69,500	175,060	244,560	104,758	57.2%
Boundary Street Lighting	-	-	23,224	23,224	23,224	0.0%
Boundary Street Streetscape	45,035	3,359,250	(464,038)	2,895,212	2,850,177	1.6%
Townwide Wayfinding Signage System	-	-	72,238	72,238	72,238	0.0%
Historic District Overhead Power Conversion	-	74,000	(13,200)	60,800	60,800	0.0%
Ghost Roads	228	376,000	(53,784)	322,216	321,988	0.1%
Washington Square Connector	2,415	-	261,940	261,940	259,525	0.9%
<b>Total Roads</b>	<b>564,771</b>	<b>4,766,215</b>	<b>206,215</b>	<b>4,972,430</b>	<b>4,407,659</b>	<b>11.4%</b>
<b>Stormwater and Sewer</b>						
Sewer Connections Policy	6,035	459,046	150,189	609,235	603,200	1.0%
Historic District Sewer Extension Phase 4	163,134	575,760	3,079	578,839	415,705	28.2%
Historic District Sewer Extension Phase 5	220,420	183,920	332,859	516,779	296,359	42.7%
Historic District Sewer Extension Phase 6	201,569	201,700	442,776	644,476	442,907	31.3%
Bridge Street Streetscape	237,833	1,593,313	118,040	1,711,353	1,473,520	13.9%
Comprehensive Drainage Plan Improvements	30,268	84,500	121,500	206,000	175,732	14.7%
May River Action Plan Impervious Restoration/Water Quality Project	-	-	15,000	15,000	15,000	0.0%
Stoney Crest Campground/Old Palmetto Bluff Rd	962,603	1,352,432	-	1,352,432	389,829	71.2%
Pritchard Street Drainage Improvements	569,177	1,224,366	1,318,634	2,543,000	1,973,823	22.4%
<b>Total Stormwater and Sewer</b>	<b>2,391,039</b>	<b>5,675,037</b>	<b>2,502,077</b>	<b>8,177,114</b>	<b>5,786,075</b>	<b>29.2%</b>
<b>Total CIP Expenditures</b>	<b>\$ 16,844,481</b>	<b>\$ 33,070,523</b>	<b>\$ 8,523,062</b>	<b>\$ 41,593,585</b>	<b>\$ 24,749,104</b>	<b>40.5%</b>



Town of Bluffton  
Special Revenue Accounts  
For Period Ending April 30, 2026

	FY2026												Original Estimate		
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	Period 13	YTD	Original Estimate
<b>Revenues</b>															
State Accommodations Tax	512	616	659	542	280,235	483	266,375	365	467	431				550,685	1,097,875
Local Accommodations Tax	2,117	164,745	133,309	118,983	195,878	173,927	149,358	78,220	103,865	235,560				1,355,962	1,322,792
Hospitality Tax	4,562	336,180	358,387	355,891	379,408	400,676	357,198	325,989	346,505	430,013				3,294,809	4,261,955
<b>Total Revenues</b>	<b>7,191</b>	<b>501,541</b>	<b>492,355</b>	<b>475,416</b>	<b>855,521</b>	<b>575,086</b>	<b>772,931</b>	<b>404,574</b>	<b>450,837</b>	<b>666,004</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>5,201,456</b>	<b>6,682,622</b>

	FY2025												Original Estimate		
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	Period 13	YTD	Original Estimate
<b>Revenues</b>															
State Accommodations Tax	1,571	1,830	1,559	1,417	271,078	697	632	290,058	673	664	174,809	549	435,462	1,180,999	1,022,605
Local Accommodations Tax	2,700	60,640	138,169	122,416	194,338	192,218	129,925	55,057	93,013	177,747	230,699	217,123	191,598	1,805,643	1,342,930
Hospitality Tax	8,468	281,963	305,218	314,531	351,835	411,775	348,925	294,270	311,950	420,178	370,020	422,794	392,612	4,234,539	4,140,747
<b>Total Revenues</b>	<b>12,739</b>	<b>344,433</b>	<b>444,946</b>	<b>438,364</b>	<b>817,251</b>	<b>604,690</b>	<b>479,482</b>	<b>639,385</b>	<b>405,636</b>	<b>598,589</b>	<b>775,528</b>	<b>640,466</b>	<b>1,019,672</b>	<b>7,221,181</b>	<b>6,506,282</b>

	FY2026 VS FY2025 (more / (less))													
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	Period 13	YTD
<b>Revenues</b>														
State Accommodations Tax	(1,059)	(1,214)	(900)	(875)	9,157	(214)	265,743	(289,693)	(206)	(233)				(19,494)
Local Accommodations Tax	(583)	104,105	(4,860)	(3,433)	1,540	(18,291)	19,433	23,163	10,852	57,813				189,739
Hospitality Tax	(3,906)	54,217	53,169	41,360	27,573	(11,099)	8,273	31,719	34,555	9,835				245,696
<b>Total Revenues</b>	<b>(5,548)</b>	<b>157,108</b>	<b>47,409</b>	<b>37,052</b>	<b>38,270</b>	<b>(29,604)</b>	<b>293,449</b>	<b>(234,811)</b>	<b>45,201</b>	<b>67,415</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>415,941</b>

	FY2024												Original Estimate		
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	Period 13	YTD	Original Estimate
<b>Revenues</b>															
State Accommodations Tax	1,533	1,721	1,963	237,553	1,773	2,006	249,085	1,857	2,041	161,350	1,868	1,570	457,086	1,121,406	1,030,150
Local Accommodations Tax	5,551	152,136	108,061	124,885	176,611	171,277	117,868	70,760	89,999	183,177	210,129	186,173	269,837	1,866,464	1,597,500
Hospitality Tax	54,512	340,435	282,100	283,048	355,917	349,776	385,693	223,058	314,287	383,243	392,360	423,103	345,958	4,133,490	3,788,036
<b>Total Revenues</b>	<b>61,596</b>	<b>494,292</b>	<b>392,124</b>	<b>645,486</b>	<b>534,301</b>	<b>523,059</b>	<b>752,646</b>	<b>295,675</b>	<b>406,327</b>	<b>727,770</b>	<b>604,357</b>	<b>610,846</b>	<b>1,072,881</b>	<b>7,121,360</b>	<b>6,415,686</b>

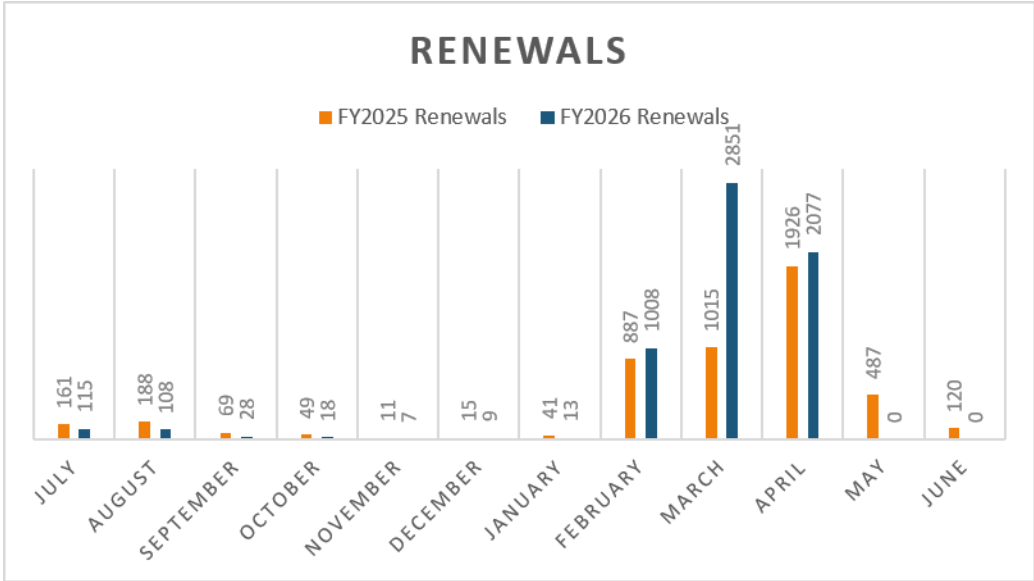
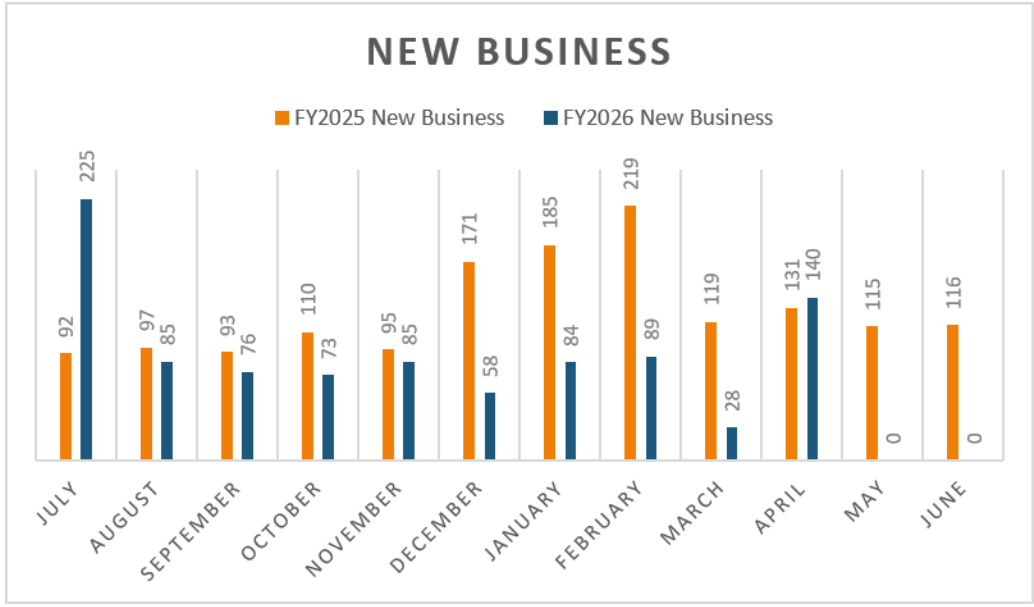
	FY2025 VS FY2024 (more / (less))													
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	Period 13	YTD
<b>Revenues</b>														
State Accommodations Tax	38	109	(404)	(236,136)	269,305	(1,309)	(248,453)	288,201	(1,368)	(160,686)	172,941	(1,021)	(21,624)	59,593
Local Accommodations Tax	(2,851)	(91,496)	30,108	(2,469)	17,727	20,941	12,057	(15,703)	3,014	(5,430)	20,570	30,950	(78,239)	(60,821)
Hospitality Tax	(46,044)	(58,472)	23,118	31,483	(4,082)	61,999	(36,768)	71,212	(2,337)	36,935	(22,340)	(309)	46,654	101,049
<b>Total Revenues</b>	<b>(48,857)</b>	<b>(149,859)</b>	<b>52,822</b>	<b>(207,122)</b>	<b>282,950</b>	<b>81,631</b>	<b>(273,164)</b>	<b>343,710</b>	<b>(691)</b>	<b>(129,181)</b>	<b>171,171</b>	<b>29,620</b>	<b>(53,209)</b>	<b>99,821</b>

	FY2023												Original Estimate		
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	Period 13	YTD	Original Estimate
<b>Revenues</b>															
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	1,175,700
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	176,432	1,731,779	1,577,800
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	2,730,300
<b>Total Revenues</b>	<b>5,699</b>	<b>429,252</b>	<b>408,456</b>	<b>706,249</b>	<b>489,478</b>	<b>466,828</b>	<b>635,257</b>	<b>299,835</b>	<b>394,471</b>	<b>257,876</b>	<b>824,412</b>	<b>542,009</b>	<b>1,067,142</b>	<b>6,526,964</b>	<b>5,483,800</b>

	FY2024 VS FY2023 (more / (less))													
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	Period 13	YTD
<b>Revenues</b>														
State Accommodations Tax	1,133	1,253	1,454	(18,588)	990	1,109	19,804	941	886	16,067	480	104	(27,749)	(2,116)
Local Accommodations Tax	4,937	(21,467)	(18,807)	(12,632)	23,670	13,203	3,229	7,406	6,784	158,202	(121,554)	(1,690)	93,405	134,685
Hospitality Tax	49,827	85,254	1,021	(29,543)	20,163	41,919	94,356	(12,507)	4,187	295,624	(98,982)	70,424	(59,917)	461,826
<b>Total Revenues</b>	<b>55,897</b>	<b>65,040</b>	<b>(16,332)</b>	<b>(60,763)</b>	<b>44,823</b>	<b>56,231</b>	<b>117,389</b>	<b>(4,160)</b>	<b>11,856</b>	<b>469,894</b>	<b>(220,055)</b>	<b>68,837</b>	<b>5,739</b>	<b>594,396</b>

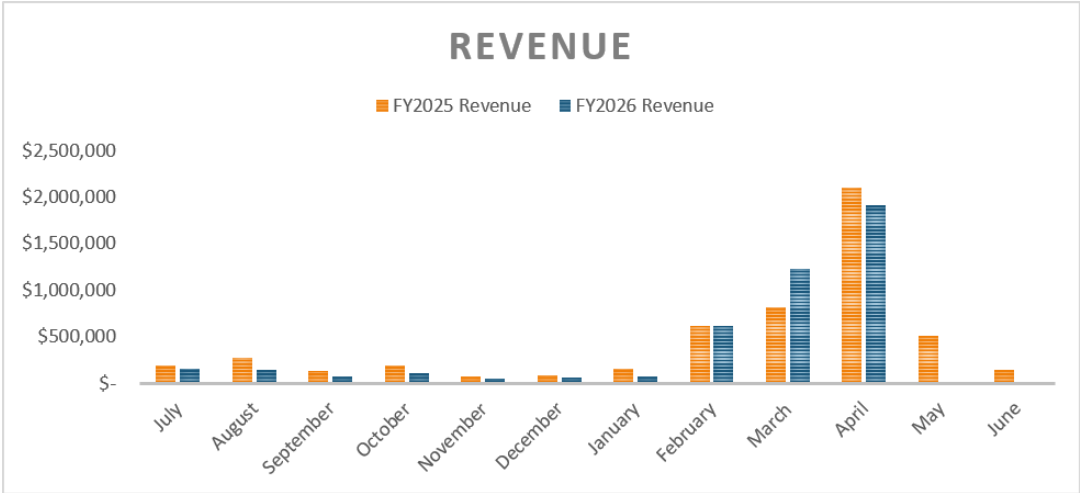
Business License Statistics:

Business License applications for FY2026 through April total 7,177 (943 new business and 6,234 renewals) compared to FY2025's total of 5,674 (1,312 new business and 4,362 renewals).



Attach

Business license renewals reflect an increase of 8% or 151 and revenue collections increased 2% or \$30,212 for the month of April when compared to last year. Business license revenue generated through permits decreased by 78% or \$217,769.



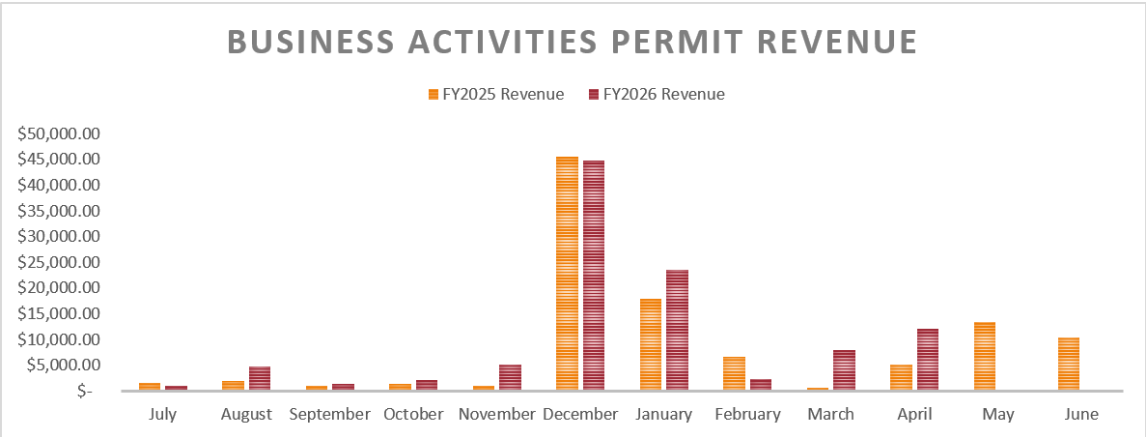
The amended ordinance that went into effect January 1<sup>st</sup>, 2019 included additional incentives for new businesses and businesses with multiple locations within the Town. For the 2026 business license renewals, there were one thousand, three hundred, and two (1,302) renewals eligible for an incentive.

Incentive	Number of Businesses	Gross Income Deducted	Total Incentive Amount
10%	241	\$ 5,134,732	\$ 531,246
20%	251	12,866,160	19,022
40%	301	14,308,742	21,155
CAP	9	220,321,680	245,611
2+	500	22,454,222	25,810
<b>Grand Total</b>	<b>1,302</b>	<b>\$ 275,085,536</b>	<b>\$ 842,844</b>

Rate Class	Number of Businesses	Total Incentive Amount
1	179	\$ 210,427
2	50	7,317
3	59	3,203
4	132	15,056
5	55	3,605
6	2	64
7	789	542,778
8.1	35	52,617
8.6	-	-
9.3	1	7,777
<b>Grand Total</b>	<b>1,302</b>	<b>\$ 842,844</b>

Included in the Business License Revenue are permits for both Mobile Vending and Short-Term Rental.

- Mobile Vending Permit (MVP): \$50 for a calendar year
  - Twenty-two (22) MVPs issued in April
  - Twenty-nine (29) are compliant
  - Six (6) are non-compliant
  - Eleven (11) are in-process
  - There are forty-six (46) identified Mobile Vending businesses
- Short-Term Rental Permit (STRP): \$325 for a calendar year
  - Thirty-two (32) STRPs issued in April
    - One (1) for 2025
    - Thirty-one (31) for 2026
  - Two hundred and forty-four (244) STRPs are compliant with a permit
  - Sixteen (16) are non-compliant
  - Twenty-four (24) are in-process
  - There are two hundred and eighty-four (284) 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
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	7/12/2026 Extension
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 COPS Technology and Equipment Program Invitational Solicitation	Federal	15JCOPS-24-GG-02292	equipment for PD	Police	Active	\$ 1,348,000.00	none	\$ 1,348,000.00	9/30/2024	3/9/2024	12/31/2026 extension
FY23 State and Local Cybersecurity Grant Program	Federal	23SLCGP14	cybersecurity project	IT	Active	\$ 79,500.00	\$ 15,900.00	\$ 95,400.00	6/18/2025	6/1/2025	5/31/2026
State of South Carolina and Subrecipient Public Assistance Funding - Hurricane Helene	Federal	Agreement A47118	4829, Helene	Exec	Active	\$ 99,209.56	none; state match	\$ 113,773.84	4/15/2025	9/29/2024	until FEMA closes
State of South Carolina and Subrecipient Public Assistance Funding - Tropical Storm Debby	Federal	Agreement 6882F6	4835, Debby	Exec	Active	\$ 70,517.87	none; state match	\$ 92,554.69	4/18/2025	9/29/2024	until FEMA closes

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	10/15/2026
National Opioid Guaranteed Political Subdivision Subfund	State	none	Opioid settlement money	Exec	Active	\$ 33,120.00	none	\$ 33,120.00	3/5/2026	4/1/2026	3/31/2027
South Carolina Power Team Site Readiness Fund (SRF) Grant	Local	n/a	economic development for Buckwalter MCIP, Building A	Exec	Active	\$ 1,000,000.00	\$ 2,715,365.00	\$ 4,045,365.00	6/25/2024	11/13/2024	12/31/2025
FY25 State Appropriation Act	State	none	K9 program	Police	Active	\$ 50,000.00	none	\$ 50,000.00	7/24/2024	7/1/2024	6/15/2026
State of South Carolina and Subrecipient Public Assistance Funding - Hurricane Helene	State	Agreement A47118	4829, Helene	Exec	Active	\$ 14,564.28	none	see Federal project	4/15/2025	9/29/2024	until FEMA closes
State of South Carolina and Subrecipient Public Assistance Funding - Tropical Storm Debby	State	Agreement 6882F6	4835, Debby	Exec	Active	\$ 22,036.82	none	see Federal project	4/18/2025	9/29/2024	until FEMA closes
School Safety Program FY26 (School Resource Officer)	State	SR-018-C0702-26	continued funding for six SROs in FY26	Police	Active	\$ 540,346.00	none	\$ 540,346.00	7/28/2025	7/1/2025	6/30/2026
Palmetto Pride Tree Grant	Local/Non Profit	none	Tree grant for 257 trees	Public Works	Active				9/30/2025	10/1/2025	9/30/2026
Sarah Riley Hooks Cottage Restoration	Local	25S-015-06102025	ATAX award for Sarah Riley Hooks Cottage	CIP	Active	\$ 257,304.00	\$ 600,000.00	\$ 857,680.00	7/16/2025	6/1/2025	5/31/2026
BJHT Home Repair Assistance	Local/Non Profit		Home Repair Assistance (NAP)	Growth Management	Active	\$ 50,000.00	none	\$ 50,000.00	2/9/2026	2/9/2026	6/30/2026
						\$ 8,201,496.53					

Hazard Mitigation Grant Program	Federal		Historic District drainage	Watershed	pre-app approved 5/5/25; full application due 8/29/25	\$ 287,625.00	\$ 95,875.00	\$ 383,500.00			
National Coastal Resiliency Fund	private non-profit but this money is primarily Federal.		Planning Assessment for Wetlands Mitigation	Watershed	full application due 7/18/25; determination by 12/2025; awards between March and June 2026.	\$ -	\$ -	\$ -			Did not get funded- 12/3/25
Land and Water Conservation Fund	Federal		New Riverside Barn Park Phase 2	CIP	pre-app filed 9/11; full app due 12/5	\$ 1,000,000.00	\$ 1,000,000.00	\$ 2,000,000.00			
Relentless Challenge Grant	State		DRCI- Smart Growth for Bluffton: Expanding and Attracting Business	DRCI	Reapplying May 2026	\$ 50,000.00	\$ 50,000.00	\$ 100,000.00			

	<b>As of April 2026</b>					
	<b>Bluffton Police Department Benevolence Fund</b>		<b>Mayor's Stay Safe Bluffton Scholarship Fund</b>		<b>Town of Bluffton Parks &amp; Public Art Fund</b>	
	Apr. 2026	FY through Mar. 2026	Apr. 2026	FY through Mar. 2026	Apr. 2026	FY through Mar. 2026
Beginning Balance	\$ 141,150.10	\$ 139,272.80	\$ 31,400.29	\$ 25,473.25	\$ 24,024.14	\$ 3,945.09
<b>Contributions &amp; Investment Activity</b>						
Contributions to Fund	\$ -	\$ 1,100.00	\$ -	\$ 5,846.92	\$ -	\$ 20,000.00
Interest & Dividend Income	81.75	2,331.42	18.18	491.07	13.91	222.91
Investment Income & Losses	168.34	290.56	37.45	51.96	28.65	(19.21)
<b>Total Contributions &amp; Investment Activity</b>	<b>250.09</b>	<b>3,721.98</b>	<b>55.63</b>	<b>6,389.95</b>	<b>42.56</b>	<b>20,203.70</b>
<b>Expenses</b>						
Distributions - Grants	-	-	-	-	-	-
Distributions - Program Expenses	-	-	-	-	-	-
Fees - Administrative & Investment	0.09	1,579.88	0.02	330.36	0.02	82.11
Fees - Credit Card Processing	-	14.80	-	76.94	-	-
<b>Total Expenses</b>	<b>0.09</b>	<b>1,594.68</b>	<b>0.02</b>	<b>407.30</b>	<b>0.02</b>	<b>82.11</b>
<b>Net Change to Fund Balance</b>	<b>\$ 250.00</b>	<b>\$ 2,127.30</b>	<b>\$ 55.61</b>	<b>\$ 5,982.65</b>	<b>\$ 42.54</b>	<b>\$ 20,121.59</b>
<b>Pending Contributions</b>						
Total Pending Contributions		\$ -		\$ -		\$ -
<b>Pending Expenses</b>						
Total Pending Expenses		-		-		-
<b>Projected Ending Balance</b>		<b>\$ 141,400.10</b>		<b>\$ 31,455.90</b>		<b>\$ 24,066.68</b>

TOWN COUNCIL



STAFF REPORT  
Human Resources Department

<b>MEETING DATE:</b>	June 9, 2026
<b>PROJECT:</b>	May 2026 Activity Report
<b>PROJECT MANAGER:</b>	Anni Evans, Director of Human Resources

**Human Resources Summary:**

**New Hire: 9 Interns**

Zoe Stevenson: Welcome Center  
 Samuel Thompson: Finance  
 Samuel Leininger: Finance  
 Ella Booroom: Finance

Sofia Giordani: DRCI  
 Brittany Romero: Human Resources  
 Taylor Geiserman: Police Department  
 Roman Orlando: Police Department

**Exits: 2**

Christopher Cash  
 Title: Police Officer  
 Date: May 4, 2026  
 Department: Police

Oscar Frazier  
 Title: Police Sergeant  
 Date: May 26, 2026  
 Department: Police

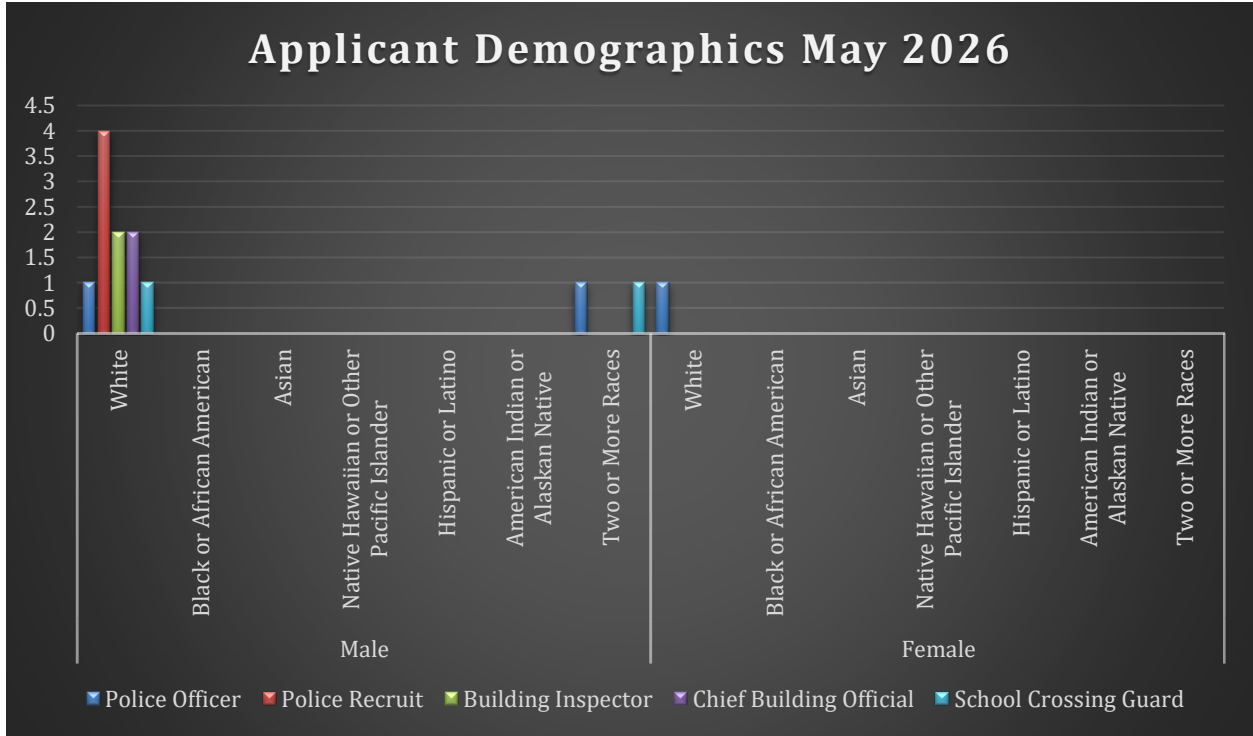
**Jobs posted:**

Police Officer  
 Police Recruit  
 Building Inspector  
 Chief Building Official

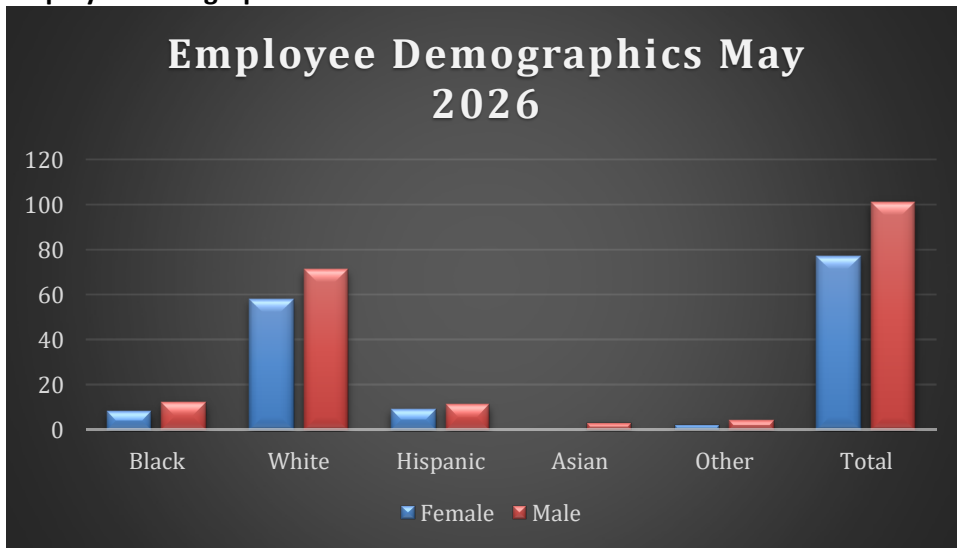
Summer Intern opportunities  
 Crossing Guard

- Birthday/Anniversary Celebration – 5/27 Mocktail Bar
- May Wellness Events:
  - Mental Health Awareness Month: More Good Days Together presentation: 5/27
  - Email campaigns for:
    - Mental Health Awareness Month
    - Skin Cancer Awareness Month
- Public Service Appreciation Week: 5/3 – 9
  - Coloring Project in break room
  - Word Cloud generator
  - Cone Crazy Ice Cream Food Truck: 5/6
  - Donuts on Friday
- Law Enforcement Appreciation Week: 5/10 – 16
  - Lawyers Food Truck: 5/10
  - Appreciation gift bags handed out
- Public Works Appreciation Week: 5/17 -23
  - Eggs Up Grill catered lunch: 5/20
  - Appreciation gift bags handed out
- May River Tour for interns 5/21
- Career Fair: Hiring Our Heroes 5/7

Candidate demographics:



Employee demographics:



TOWN COUNCIL



STAFF REPORT  
Municipal Court Department

<b>MEETING DATE:</b>	June 9, 2026
<b>PROJECT:</b>	April Activity Report
<b>PROJECT MANAGER:</b>	Lisa Cunningham, Clerk of Court

**Court Summary**

Town of Bluffton Municipal Court convenes every Tuesday morning. In April 2026 a total of four morning sessions. The Municipal Court currently has 512 cases pending, which is a combination of 451 criminal/traffic cases, 30 jury trial requests, and 31 defendants enrolled in alternative programs.

**Indigent Defense cases**

Town of Bluffton currently contracts with the Law Office of Carol Miller to provide Indigent Defense Counsel to all defendants who meet the Annual Federal Poverty Guidelines. Year to date our Indigent Defense Attorney has 31 pending as of April 2026.

**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 7 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 15 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 1 active participants. AEP is only inclusive for alcohol related charges such as minor in possession 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 5 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.

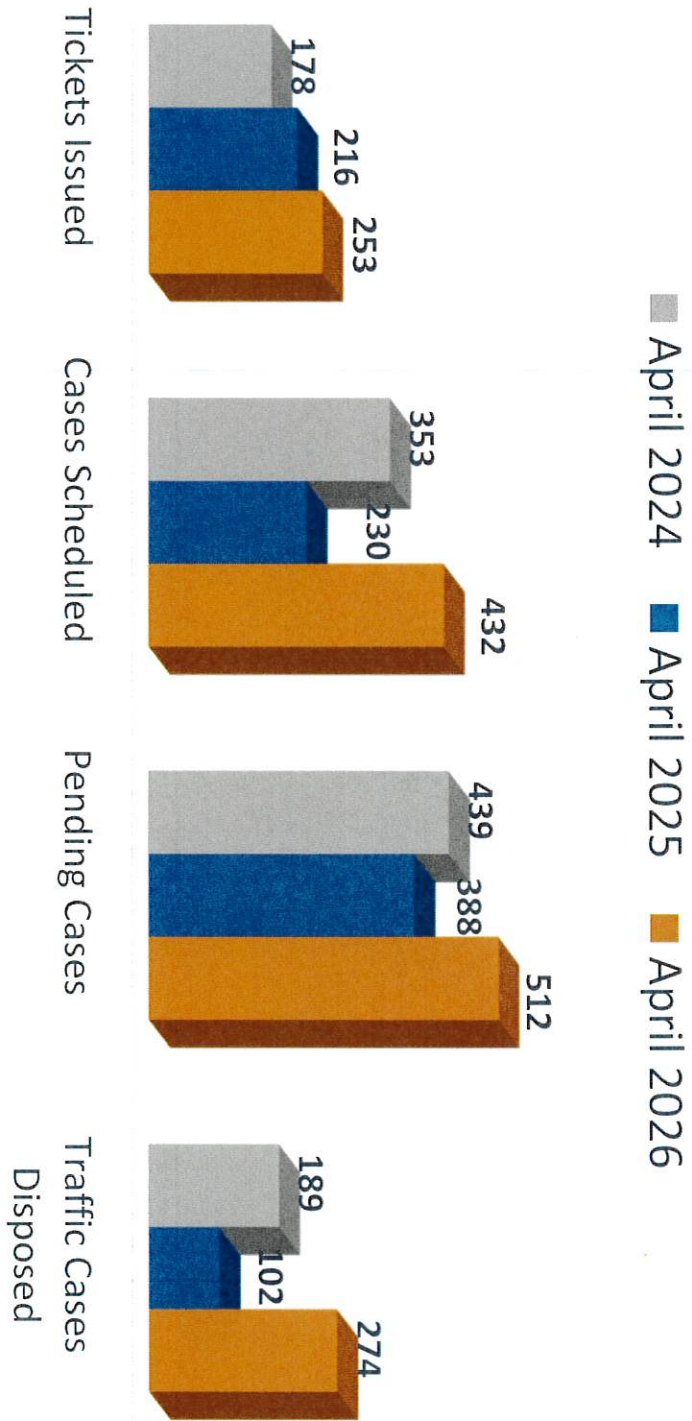
# Town of Bluffton Municipal Court Statistics for April 2026

Presented by:  
Lisa Cunningham, Clerk of Court

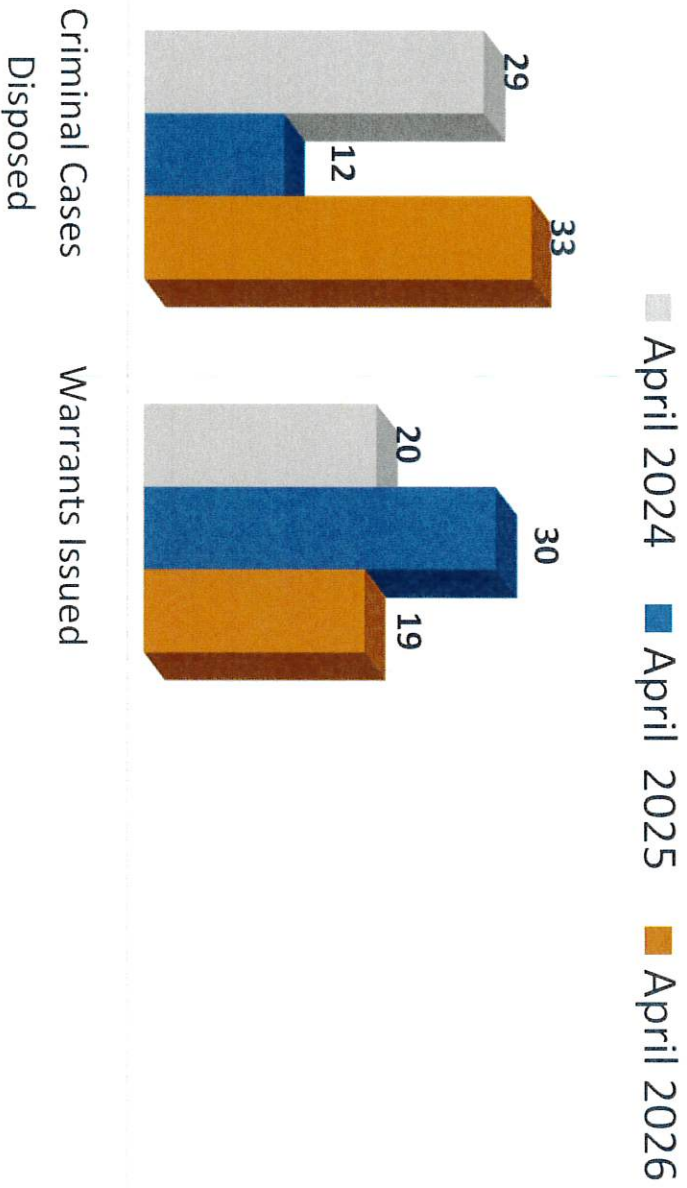




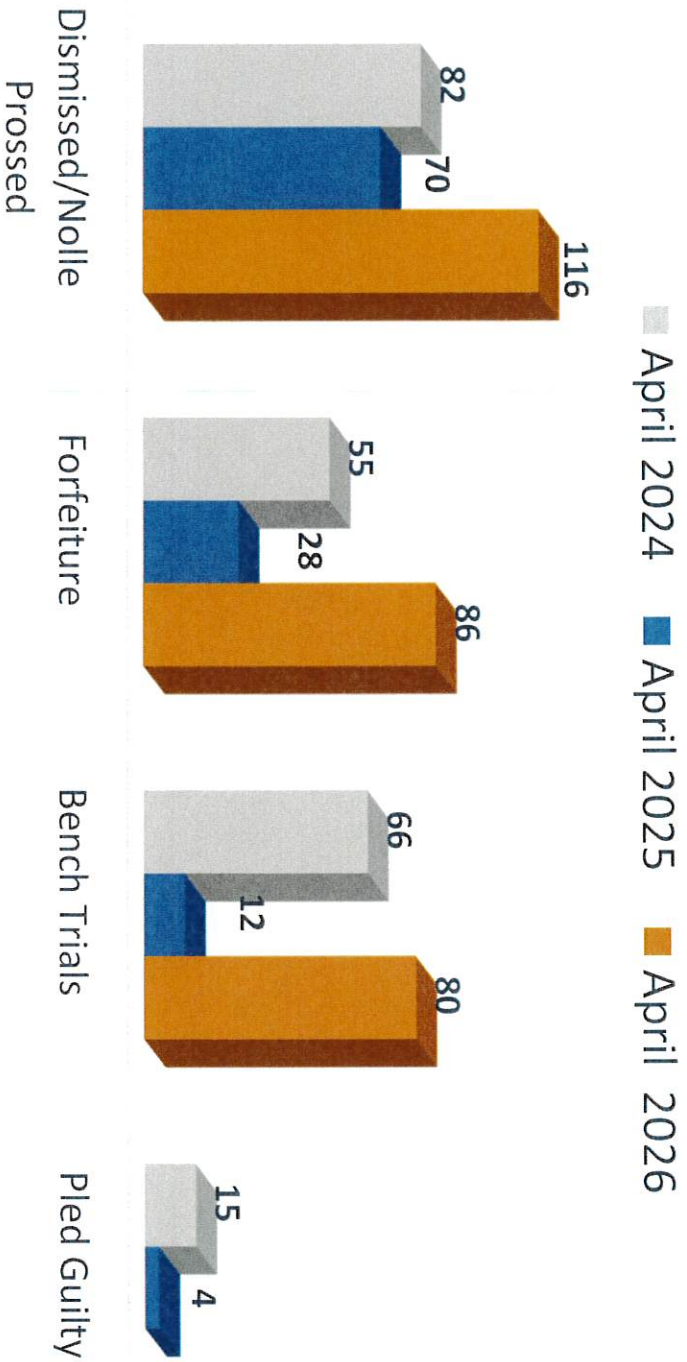
# Town of Bluffton Municipal Court



# 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

<b>MEETING DATE:</b>	June 9, 2026
<b>SUBJECT:</b>	Projects and Watershed Resilience Department Monthly Report
<b>PROJECT MANAGER:</b>	Kimberly Washok-Jones, Department Director

**CAPITAL IMPROVEMENTS PROGRAM (CIP) UPDATE**

**Administrative Update**

- Finalized budgets for FY27 Operating expenses and CIP project data sheets.

**FACILITIES**

**1. Law Enforcement Center Facility Improvements**

- PS emergency procurement of HVAC underway.

**2. Sarah Riley Hooks Cottage**

- Interior trim, utility connections and mechanical hook ups are underway.
- Executed contract for site and landscape construction with Nix Construction.
- Site construction began May 2026.
- **Next Steps:**
  - Continue cottage reconstruction through FY26. Site construction to be completed in the Fall 2026.

**3. New Riverside Barn Park – Public Services Building**

- Architectural Plans, Site Development Plans and easements are **complete**.
- **Next Steps:**
  - Complete structural design and permitting in FY26.
  - Prepare bid solicitations in Summer 2026 for building and site development construction in FY27.

**4. New Riverside Barn Park – Event Lawn Pavilion**

- **Complete.**

**5. Public Services Expansion and New Watershed Facility**

- Obtained wetland surveys to evaluate developable land for expansion.
- **Next Steps:**
  - Special PM to determine site capacity of upland property for future PS expansion.

**HOUSING**

**1. Town of Bluffton Affordable Housing Projects– The May & 115 Bluffton Rd.**

- WorkForce State of Mind partnership to construct 12 units at 1095 May River Rd. (The May) to be completed in 2027.
- **Next Steps:**
  - Staff reviews applications for payment.
  - Solicitation closes 6/11/26 for next Workforce Housing project at 115 Bluffton Road.

**PARKS**

**1. Park Improvements**

- Landscape modifications at Wright Family Park are **complete**.
- Complete installation of site furnishings in FY26.

**2. Oyster Factory Park**

- Pavilion repairs **complete**.
- Bids received for restroom expansion.
- **Next Steps:**
  - Award contract for restroom construction.

**3. Oscar Frazier Park**

- Begin construction of a second pavilion in June 2026.

**4. New Riverside Barn Park – Phase 2 Trails & Disc Golf**

- Obtained bids for disc golf features in May.
- **Next Steps:**
  - Post solicitation for Phase 2 trails in Summer 2026 with construction in Fall 2026.
  - Award construction contract for disc golf features, e.g. pads, baskets, steps, retaining walls, etc.

**5. New River Linear Trail**

- BPD enforcing no trespassing until construction is completed in Fall 2026.
- Construction of all three bridges, Four Seasons boardwalk connection, and pier are **complete**.
- **Next Steps:**
  - Construction of 10' paved pathway ongoing.

**6. Buckwalter Place Park Improvements**

- Hilton Head Landscape has begun construction of Phase 2 and 3 site improvements.
- Retaining wall **complete**.
- Trellis swing, misting station, and pathways ongoing.
- **Next Steps:**
  - Concrete pour at pavilions.

**STORMWATER & SEWER****1. Historic District Sewer Extension Phases 4 through 6 – Lawrence, Green and Water Streets**

- Main line sewer construction and as-builts for HD Sewer are **complete**.
- **Next Steps:**
  - BJWSA approved testing of main line system. Awaiting permit to operate from DES.
  - Begin service connections and pump stations construction.

**2. Comprehensive Drainage Plan Improvements**

- Draft Engineering Report for Crooked Cove **completed** and comments provided. Field meeting was held to discuss recommended projects and alternatives.
- Additional flow data is needed to calibrate H/H 2D model for Crooked and Guerrard Coves and is in process.
- **Next Steps:**
  - Guerrard Cove Engineering Report submittal.
  - Rose Dhu Creek RFQu posted.
  - SCEMD HMGP Grant Application for Huger/Verdier Cove Watershed Study pending.

**3. May River Watershed Action Plan Impervious Restoration Water Quality Projects**

- Preliminary Design of 9 participating sites **complete**.
- 15 additional sites' concept plans **completed**.
- Internal discussions and review of Impervious Restoration Program policy document held and comments being prepared for Final Draft development.

- **Next Steps:**

- Finalize Impervious Restoration Program Policy Document.
- Collaborate with Director of Procurement for BCSD and private owners' agreement to construct impervious restoration projects at school sites.

#### 4. Stoney Creek/Palmetto Bluff Sewer Partnership

- BJWSA is the Project Manager as RIA-SCIIP grant recipient; updates can be found [here](#).

### **ROADS**

#### 1. Pathway Pedestrian Safety Improvements

- ***Completed*** Historic District for ADA compliance and May River Road RRFB crossings.
- **Next Steps:**
  - Bluffton Road, New Riverside Road, and phase 3 additional design of 30 locations continues. Working with SROs and school officials for crossings near schools.

#### 2. Bridge Street Streetscape

- Public information meeting held 4/23/26.
- **Next Steps:**
  - Construction and email communication to stakeholders ongoing.

#### 3. Calhoun Street Streetscape

- Preliminary engineering design is 80% complete and plans submitted to agencies for review and approval.
- **Next Steps:**
  - Continue easement negotiations with May River Road property owners for main transmission line for underground power.
  - Continue to coordinate underground power layout and modifications with Dominion Energy and CDDC Design.
  - Prepare easement acquisition plats for phase 1 in FY26 and begin easement acquisition.
  - Phased construction planned to begin in FY28 pending budget approval and acquisition of all required easements.

#### 4. Boundary Street Streetscape

- Engineering design is 90% complete and submitted to agencies for review.
- Submitted SCDES permit amendment moving Lawrence St. drainage outfall to Green St.
- **Next Steps:**
  - Prepare easement exhibits, appraisals and continue easement negotiations.
  - Construction to be bid FY27, subject to acquisition of easements and permits.

#### 5. Ghost Roads – No further action is necessary.

- TC and legal's determination is the Town owns all Ghost Roads.

#### 6. Pritchard Street Drainage Improvements

- Design submittal for relocation of sidewalk north of MC Riley Early Childhood Learning Center to reduce tree removals **completed** and pending Proposal from Contractor.
- **Next Steps:**
  - All easements for construction have been acquired or agreed upon.
  - Submit final 319 grant report upon project completion.

**THIS SPACE LEFT INTENTIONALLY BLANK.**

## **WATERSHED MANAGEMENT UPDATE**

### **Administrative Update**

- Finalized budgets for FY27 Operating/CIP expenses.
- 1. SC Department of Environmental Services May River Shellfish Harvesting Monitoring Data Year-to-Date and May River Shellfish Harvesting Status Exhibit – *Attachments 1 and 1a***
  - 2. May River Watershed Action Plan Implementation Summary – *Attachment 2, 2a, 2b, and 3***
    - The next May River Watershed Action Plan Advisory Committee (WAPAC) meeting is 7/23/26.
    - Lewis and Quast met with Biohabitats to discuss Microbial Source Tracking (MST) Program.
    - Lewis and Quast met with McCormick Taylor, Inc. to discuss deliverables to implement the May River Watershed Action Plan Update and Model Report.
    - SCDES collected shellfish harvesting samples in May. Results pending.
    - MST Sampling Program targets potential human, dog, deer, horse, and bird fecal sources.
      - Collect five (5) wet and dry weather events for each subwatershed.
      - All dry sampling events for the coves have been completed. Additional samples will only be collected during qualifying wet weather conditions.
      - No targeted MST samples collected during this reporting period.
  - 3. Resilience**
    - Resilience Plan: Council approved contract with RK&K in May. Contract finalization and project kickoff meeting scheduled.
    - Furman University's students' heat action plan report submitted to the Town.
    - Wetland Restoration Study Request for Qualifications posted and closed 6/8/26.
    - Wetlands and Resiliency Ordinances:
      - Moreno met with the City of Conway, Coastal Conservation League, and Conservation Voters of South Carolina to discuss the wetland ordinance.
      - McCormick Taylor and Center for Watershed Protection continue wetland and resilience work. Deliverables under review.
      - Proposed revisions to the Wetland Ordinance: Council first reading in June.
      - Reviews continue for Wetland Mapping Tool and accompanying memorandum with minor revisions expected.

### **Municipal Separate Storm Sewer System (MS4) Program Update**

- 1. MS4 Minimum Control Measure (MCM) - #1 Public Education and Outreach and MCM – #2 Public Participation and Involvement**
  - Lewis and Quast presented at the SC Sea Grant Biennial Research Symposium on the Town's Microbial Source Tracking (MST) Program and Moreno is presenting on the Town's SoLoCo Stormwater Design Manual on 6/11/26.
  - Lewis and Quast presented to Rotary regarding the Town's Water Quality Program.
- 2. MS4 MCM – #3 Illicit Discharge Detection and Elimination**
  - E. coli Concentrations Trend Map – *Attachment 4a*
  - Monthly Microbial Source Tracking (MST) Map – *Attachment 4b*
  - Illicit Discharge Investigations – *Attachment 4c*
- 3. MS4 MCM – #4 Construction Site Stormwater Runoff Control – *Attachment 5***
- 4. MS4 MCM – #5 Stormwater Plan Review and Related Activity – *Attachment 6***
- 5. MS4 MCM – #6 Good Housekeeping (Staff Training/Education)**
  - Lewis attended the Southeast Sustainability Director's Network meeting.
- 6. MS4 MCM – #6 Good Housekeeping (Ditch, Drainage and Roadside Maintenance)**

- New Riverside 319 Pond Restoration – project complete.
- Public Services performed weekly street sweeping on Calhoun St., Highway 46, Bruin Rd., May River Rd., Pin Oak St., and curbs/medians on Simmonsville and Buck Island Rds.
- Performed ditch inspections.
  - Buckwalter ditch (917 LF)
  - 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 Rds., Goethe Rd., Shults Rd., Jason and Able Sts., Whispering Pine Rd., May River Rd., and Eagles Field.

## **7. Citizen Request for Watershed Management Services & Activities – Attachment 7**

### **Attachments**

1. SCDES Shellfish Harvesting Monitoring Data Year-to-Date
  - a. SCDES May River Shellfish Harvesting Status Exhibit
2. May River Watershed Action Plan Implementation Summary
  - a. Cumulative Microbial Source Tracking (MST) Results for Targeted Sampling
  - b. Targeted MST Sampling Sites Map
3. May River Watershed Action Plan Advisory Committee – 2026 WAPAC Meeting Schedule
4. MS4 Minimum Control Measure #3 – Illicit Discharge Detection and Elimination
  - a. *E. coli* Concentrations Trend Map
  - b. Monthly Microbial Source Tracking Trend Map – All Sources
  - c. 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 Request for Watershed Management Services and Activities Map
8. CIP Master Project Schedules

	19-19				19-19A				19-19B				19-19C				19-24				19-16			
	2023	2024	2025	2026	2023	2024	2025	2026	2023	2024	2025	2026	2023	2024	2025	2026	2023	2024	2025	2026	2023	2024	2025	2026
	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	33.0	NS	70.0		33.0	NS	17.0		7.8	NS	2.0		13.0	NS	6.1		7.8	NS	6.8		17.0	NS	2.0	
November	13.0	170.0	13.0		2.0	130.0	23.0		4.5	170.0	4.0		4.5	49.0	4.5		2.0	79.0	46.0		4.5	33.0	4.5	
October	33.0	49.0	70.0		23.0	17.0	170.0		17.0	13.0	70.0		33.0	2.0	70.0		2.0	11.0	79.0		6.8	17.0	13.0	
September	23.0	33.0	31.0		13.0	240.0	49.0		13.0	13.0	7.8		7.8	7.8	14.0		17.0	22.0	33.0		13.0	130.0	2.0	
August	23.0	33.0	220.0		49.0	23.0	49.0		6.8	23.0	79.0		13.0	49.0	79.0		23.0	49.0	33.0		2.0	13.0	7.8	
July	350.0	31.0	70.0		920.0	31.0	79.0		70.0	32.0	350.0		49.0	32.0	130.0		33.0	33.0	21.0		17.0	32.0	11.0	
June	14.0	7.8	170.0		7.8	7.8	170.0		23.0	6.8	110.0		13.0	4.5	49.0		33.0	2.0	23.0		13.0	2.0	6.8	
May	23.0	27.0	33.0		33.0	22.0	170.0		17.0	23.0	79.0		13.0	17.0	21.0		33.0	7.8	49.0		21.0	4.0	4.5	
April	170.0	49.0	NS	2.0	130.0	17.0	NS	17.0	110.0	17.0	NS	7.8	70.0	4.0	NS	7.8	NS	11.0	NS	11.0	7.8	23.0	NS	2.0
March	23.0	49.0	240.0	49.0	49.0	31.0	46.0	70.0	17.0	11.0	23.0	33.0	17.0	4.5	7.8	17.0	17.0	22.0	13.0	6.8	17.0	4.5	4.0	13.0
February	540.0	49.0	33.0	7.8	350.0	49.0	49.0	2.0	240.0	11.0	79.0	6.8	240.0	22.0	79.0	2.0	33.0	7.8	13.0	1.8	33.0	11.0	17.0	2.0
January	33.0	49.0	NS	23.0	33.0	23.0	NS	4.5	13.0	4.5	NS	4.5	33.0	4.5	NS	7.8	7.8	7.8	NS	1.8	4.5	2.0	NS	2.0
** Truncated GeoMetric Mean	38.0	39.0	47.0	39.0	30.0	30.0	41.0	34.0	17.0	16.0	22.0	20.0	16.0	14.0	18.0	14.0	9.0	10.0	17.0	14.0	8.0	10.0	8.0	7.0
** Truncated 90th Percentile	211.0	187.0	168.0	153.0	152.0	163.0	193.0	146.0	77.0	79.0	111.0	104.0	71.0	74.0	79.0	65.0	44.0	47.0	58.0	57.0	26.0	38.0	31.0	28.0

NS = No Sample

**SCDES Regulatory Requirements:**

- Geometric Mean ≤ 14
- 90th Percentile ≤ 43

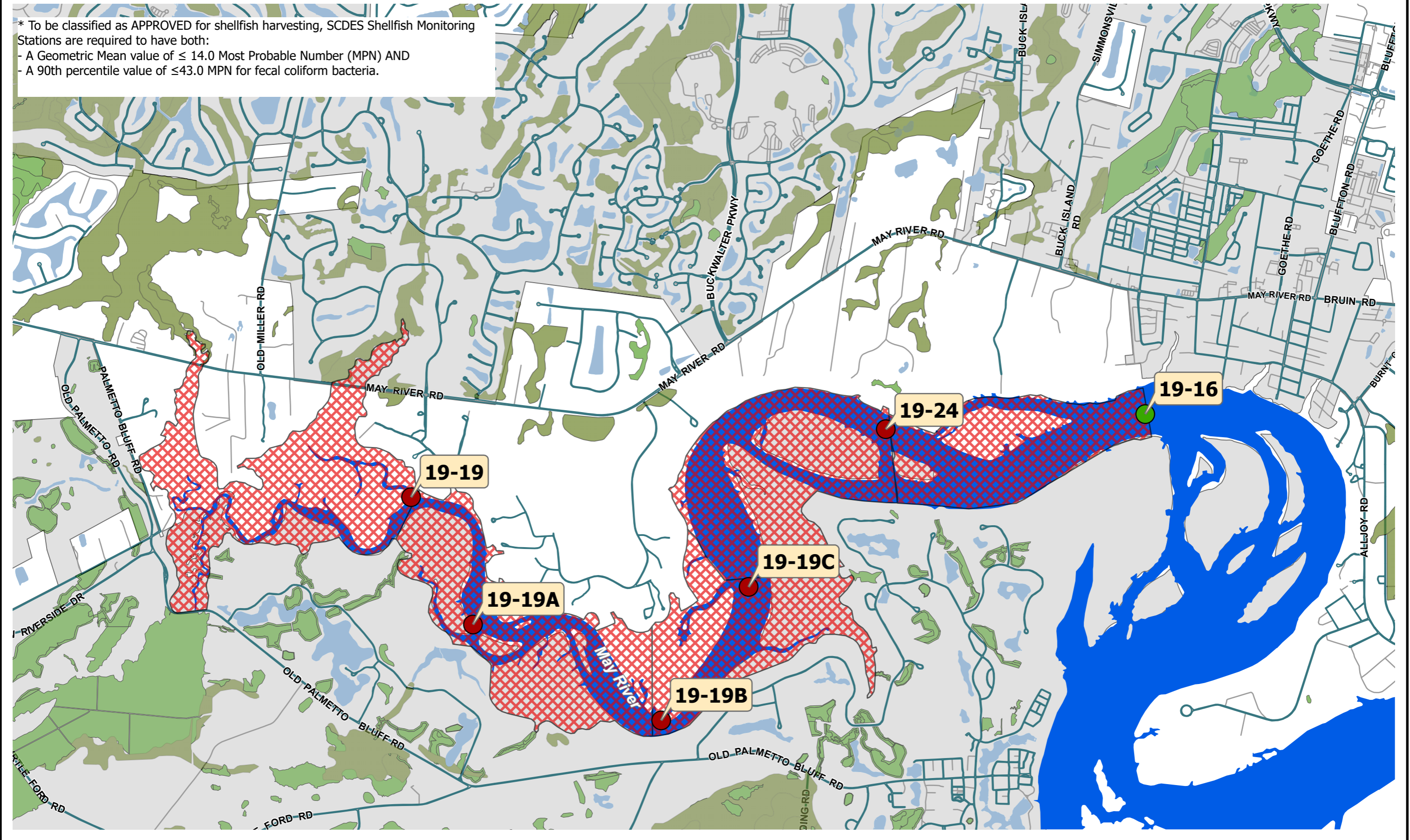
\*\* Town staff calculations utilizing SCDES statistics

**Note:**

- December 2025 ends the data collection period for 2026 shellfish harvesting season.
- December 2026 ends the data collection period for 2027 shellfish harvesting season.
- 2025 fecal coliform data is part of the 2026 classification data collection period.
- 2026 fecal coliform data is part of the 2027 classification data collection period.

\* To be classified as APPROVED for shellfish harvesting, SCDES Shellfish Monitoring Stations are required to have both:

- A Geometric Mean value of  $\leq 14.0$  Most Probable Number (MPN) AND
- A 90th percentile value of  $\leq 43.0$  MPN for fecal coliform bacteria.

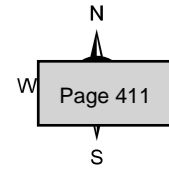
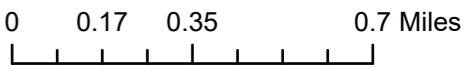
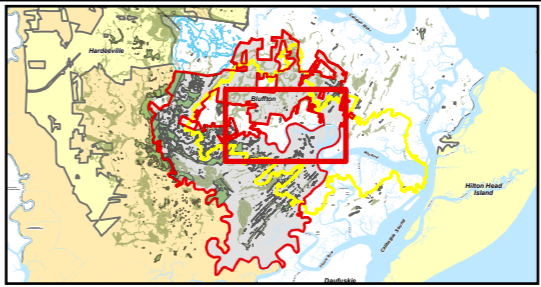


- Town Bluffton Jurisdiction
- Beaufort County Jurisdiction
- Restricted 2025/2026 Shellfish Season
- Streets
- Water
- Wetlands
- Open Shellfish Monitoring Station
- Closed Shellfish Monitoring Station

# SCDES SHELLFISH HARVESTING STATUS

## Town of Bluffton

Beaufort County, SC  
Date: 9/17/2025 9:28 AM



# May River Watershed Action Plan Update & Modeling Report (MRWAP) Implementation Summary

## **1. MRWAP Background**

- *May River Watershed Action Plan Update & Modeling Report (MRWAP)* was completed November 2020.
- Town Council adopted the MRWAP as a supporting document to the Comprehensive Plan in February 2021.
- The Action Plan Update & Modeling Report included the development of watershed-water quality models (WQ Model) for the four (4) May River Headwaters subwatersheds (Stoney Creek, Rose Dhu Creek, Duck Pond, and Palmetto Bluff) where the shellfish impairments are located.
- The purpose of the modeling effort was to better understand fecal coliform (FC) fate and transport in the Headwaters subwatersheds to develop strategies ultimately intended to open all shellfish stations to harvesting. To capture the variety of storm events and environmental conditions, the Project Team developed a continuous simulation of both water quantity and quality.
- The MRWAP included new water quality improvement projects resulting from the WQ Model. Additionally, the potential fecal bacteria reduction benefits of septic to sewer conversion in the four (4) Headwaters subwatersheds were modeled.

## **2. Septic to Sewer Project Recommendations/Evaluations**

### **Background:**

- The MRWAP evaluated four (4) septic to sewer conversion projects 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 3.46x10<sup>13</sup> FC per year.
- The estimated septic to sewer conversion costs of these projects is \$5.5 million.

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**Update: Stoney Creek/Palmetto Bluff Sewer Partnership**

- BJWSA is the Project Manager as the awardee of the RIA-SCIIP grant.
- **Next Steps:**
  - BJWSA updates can be found at: <https://bjwsa.org/251/Go2Sewer-for-a-Cleaner-Stoney-Creek>

**3. MRWAP Impervious Restoration Water Quality Projects**

**Task 1: MRWAP Eleven (11) Proposed Projects Background**

- 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.
- Based on WQ Model outputs, these projects alone may potentially reduce FC loading by
  - 2.99×10<sup>14</sup> FC reduction for the Full SWRv (entire sub-basin drainage area catchment).
  - 2.53×10<sup>14</sup> FC reduction for the Reduced SWRv projects (impervious area drainage area of sub-basin catchment).
- The estimated 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.

**Task 1: MRWAP Eleven (11) Proposed Projects Update**

- Eleven (11) proposed project sites Rose Dhu Creek (6 projects) and Stoney Creek (5 projects):
  - All geotechnical work, evaluations, site assessments, planning, engineering, and preliminary designs for the 8 original sites is **complete**.
    - 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).~~ **Declined to Participate.**
    - McCracken Middle School/Bluffton Elementary School (MMSBES).
    - May River High School.
    - ~~One Hampton Lake Apartments (OHLA).~~ **Declined to Participate.**
    - Pritchardville Elementary School (PES).

- ~~Palmetto Pointe Townes (PPT)~~. **Declined to Participate.**
- Next Steps:
  - Finalize Impervious Restoration Program (IRP) Policy Document.
  - Continue to collaborate with Director of Procurement for an agreement with BCSD and Private Owners to construct impervious restoration projects at school sites.

**Task 2: Identify Fifteen (15) New Project Sites Background**

- 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).

**Task 2: Identify Fifteen (15) New Project Sites Update**

- 15 project sites concept plan development completed.
- Next Steps:
  - Finalize Impervious Restoration Program Policy Document.
  - Collaborate with the Director of Procurement for the Beaufort County School District and private owners’ agreement to construct impervious restoration projects at school sites.

**Task 3: MRWAP Impervious Restoration Policy Documents Background**

- MRWAP 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 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.

**Task 3: MRWAP Impervious Restoration Policy Documents Update**

- Impervious Restoration Program Policy Document Draft submitted and under review. Fee-in-Lieu Program Policy Document - Adopted into the FY26 Master Fee Schedule at the July 2025 Town Council Meeting.
- As Adopted:
  - As part of the SoLoCo Stormwater Design Manual, developers may submit for MEP when the proposed development site has constraints or limitations to which prevent SoLoCo Stormwater Design Manual requirements from being met, specifically stormwater retention volume (SWRv) requirements. SWRv is the volume of stormwater runoff that a stormwater management system can store and treat to improve water quality. The MEP submittal must provide documentable evidence of the process the applicant has performed that demonstrates the restrictions to the use and implementation of the Best Management Practices (BMPs) to meet the SWRv requirements.
  - When a development project cannot accommodate the required SWRv due to on-site constraints identified in the approved MEP analysis, the developer is required to pay a Fee-In-Lieu (FIL) to the Town of Bluffton for the shortfall according to the FIL fee schedule has been adopted as part of the Master Fee Schedule. Funds collected through FIL payments will then be used by the Town to fund other qualified uses that protect water quality within the same watershed as the original project including:
    - The construction and maintenance of impervious restoration program water quality BMPs;
    - Purchase of land for increased conservation areas, application of Better Site Design to the approved Master Plan, buffers, undisturbed open space, and natural resource of significance areas, and
    - Purchase of development rights.
  - FIL payment is based on and equal to a unit of SWRv in cubic feet or designating a conservation area/easement area that protects a qualified natural resource that would otherwise require the same SWRv treatment if developed. The monetary value for a unit of SWRv is based on the current and typical costs for land as well as associated costs for design, construction, construction management, Town program management, post-construction inspection, and ongoing maintenance of water quality BMPs. The SWRv FIL rate is found in the Town’s Master Fee Schedule, under Section VII “Stormwater Management Fees,” allowing for annual review and updates as needed based on the Consumer Price Index (CPI) or based on updated information regarding the cost of water quality BMP construction and

maintenance, changes in the construction industry, availability of supplies, etc. If the developer and/or private property owner take responsibility for maintaining the BMP or provide land, then the associated cost for a unit of SWRv could be lessened accordingly.

Item/Description	Fee
<p style="text-align: center;"><b>Fee-In-Lieu (FIL)</b></p> <p>For projects with an approved Maximum Extent Practicable (MEP) submittal, the FIL amount is calculated based on an applicant’s shortfall, in cubic feet (CF), of the required Stormwater Retention Volume (SWRv).</p>	<p>\$151.92/CF of SWRv</p>

- ToB CIP Project Impervious Restoration Program & Incentives – Draft document in process.
- ToB SWRv Credit Trading Program - (under evaluation)

**4. Other, Related MRWAP Recommendations**

**Background:**

- The Town should incorporate volume reduction BMPs (those that encourage infiltration) within existing and future CIP projects to the maximum extent practical (MEP), especially for project locations with well-drained soils (HSG A or B).

**Other, Related MRWAP Recommendations Update:**

- Town is in progress of incorporating volume reduction BMPs within existing and future CIP projects to the MEP. Specific projects currently in progress include:
  - Bridge Street Streetscape Project
    - Water quality monitoring has been completed.
  - Pritchard Street Streetscape and Drainage Improvement Project
    - 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.
    - Awarded Section 319 Grant from SCDES to cost-share cost of construction of proposed water quality BMPs.
    - Construction and administration are on-going.

## **5. MRWAP Water Quality Program Recommendations Update**

### **Background:**

- Section 5.0 of the MRWAP included recommendations for the Town of Bluffton to improve upon their existing monitoring program (concentration and source typing) and flow.

### **MRWAP Water Quality Program Recommendations Update:**

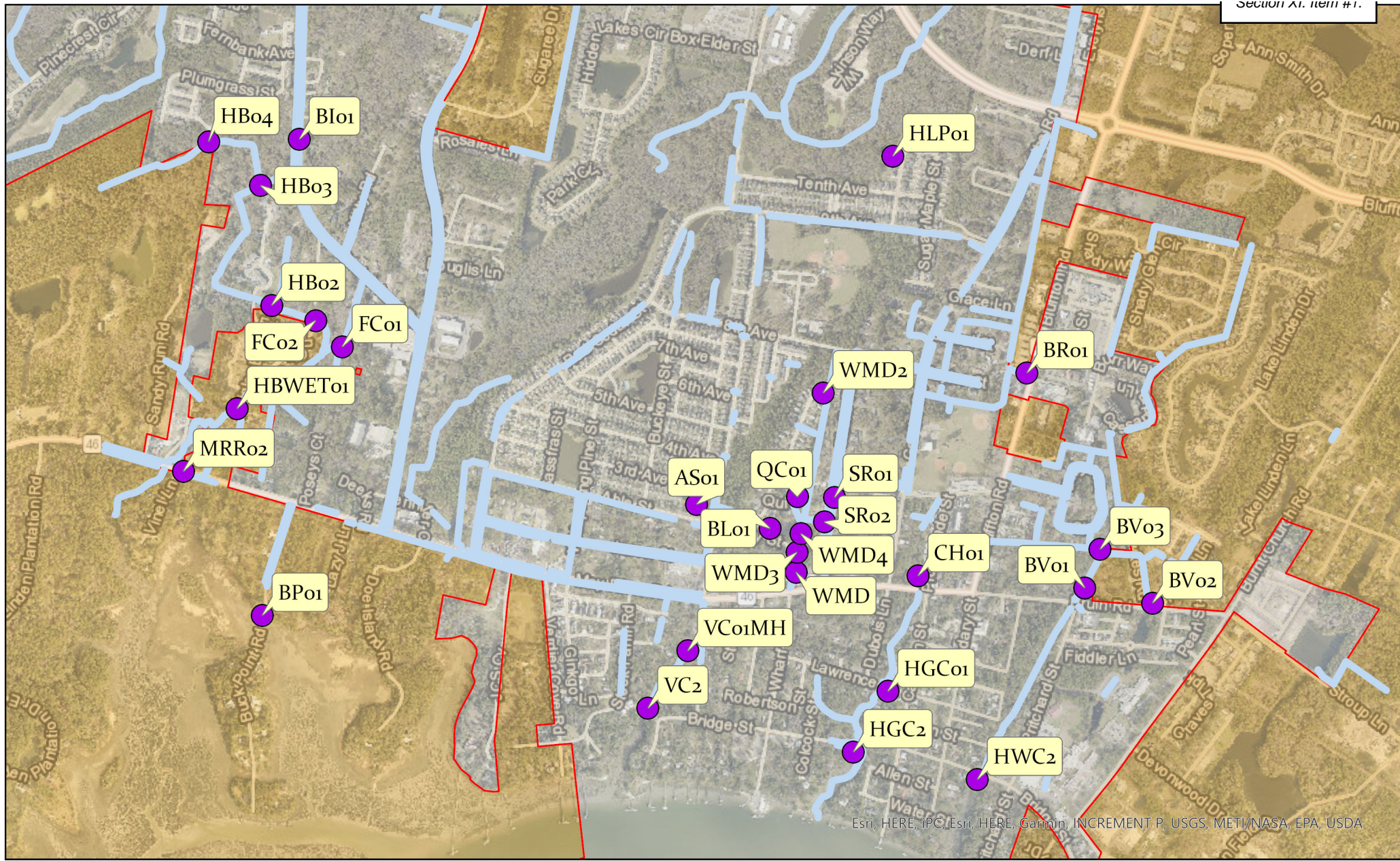
- 5.1.1 In-House Microbial Source Tracking:
  - Staff have collaborated with Dr. Tye Pettay and the USCB Microbial Source Tracking (MST) Laboratory to develop new markers for tracking fecal contamination in the May River Watershed. The primary goal is to identify the sources of bacteria and establish effective mitigation plans. The human genetic marker remains the main focus of the Town’s MST sampling program, as it poses the greatest risk to human health.
  - With the introduction of the new MST markers, Town staff have initiated a targeted MST sampling program, starting with the Crooked Cove subwatershed. The Town has now expanded this program into the Heyward, Huger, and Verdier Cove subwatersheds. The MST Program examines multiple potential sources of contamination, including human, dog, deer, horse, and bird waste. Staff are collecting samples during five (5) wet weather events and five (5) dry weather events to characterize each subwatershed.
  - All five (5) dry weather events have been completed for these subwatersheds, leaving only the wet weather events to be collected. Staff continue to focus on interpreting the MST results and developing new educational initiatives before transitioning the MST targeted sampling program to additional subwatersheds.
- 5.1.2 Future (New) Bacteria Monitoring Locations & 5.1.3 Future (New) Water Flow Monitoring Locations
  - Town staff have finalized all bacteria and flow monitoring data collection efforts recommended in sections 5.1.2 and 5.1.3 of the May River Watershed Action Plan Model Report. These efforts aim to improve/calibrate the Town’s stormwater model with a comprehensive dataset.
  - **Previous MRWAP Update:**
    - Town staff working with the Director of Compliance and Contracts to finalize procurement services related to improving/calibrating the Town’s stormwater model with all Water Quality Program data.
  - **Current 5.1.2 & 5.1.3 Update**
    - The contract for work associated with the calibration of the Town’s May River Watershed Action Plan model has been executed. Work was awarded to McCormick Taylor, Inc.

- A 1D 2024 PCSWMM Water Quality Model for the May River headwaters (Rose Dhu Creek, Stoney Creek, Palmetto Bluff, and Duck Pond) has been created and delivered to the Town. In-person PCSWMM training was held with the consultant team.
- **Next Steps:**
  - Compare PCSWMM model outputs with the Town's 2018 and 2002 XPSWMM Water Quality Models.
  - Analyze proposed May River water quality improvement projects as designed to validate anticipated improvements.
  - This initiative is part of the WAPAC FY27-FY28 Strategic Plan. The Town's consultant team is expected to present to the WAPAC in the summer or fall of this calendar year.

			Summary of All Targeted Microbial Source Tracking Marker Results To-Date									
			Human		Dog		Bird		Deer		Horse	
Sub-basin	Sampling Location	Location Description	Human (Number Times Detected/ Number Times Analyzed)	Percent of the Time Human Detected at Sampling Location	Dog (Number Times Detected/ Number Times Analyzed)	Percent of the Time Dog Detected at Sampling Location	Bird (Number Times Detected/ Number Times Analyzed)	Percent of the Time Bird Detected at Sampling Location	Deer (Number Times Detected/ Number Times Analyzed)	Percent of the Time Deer Detected at Sampling Location	Horse (Number Times Detected/ Number Times Analyzed)	Percent of the Time Horse Detected at Sampling Location
SCDES May River Shellfish Stations	19-19	May River at First Dock in Headwaters past Bluff	5/81	6.17%	2/17	11.76%	7/17	41.18%	3/15	20.00%	0/12	0.00%
	19-19A	Unnamed Tributary near SW corner of Gascoigne Bluff	3/82	3.66%	5/18	27.78%	4/17	23.53%	3/13	23.08%	0/12	0.00%
	19-19B	Bend in May River nearest the high bluff of Palmetto Bluff	4/80	5.00%	6/14	42.86%	3/14	21.43%	1/15	6.67%	1/11	9.09%
	19-19C	First Unnamed Tributary leading from Gascoigne Bluff	4/82	5.26%	2/18	11.11%	8/21	38.10%	0/14	0.00%	0/14	0.00%
	19-24	May River at Southern End of Crane Island	1/82	1.22%	2/20	10.00%	1/2	50.00%	0/9	0.00%	0/9	0.00%
Crooked Cove	HB04	Wetland area behind The Gray's Apartments	2/5	40.00%	1/5	20.00%	0/5	0.00%	5/5	100.00%	0/5	0.00%
	BI01	Buck Island Road Ditch	0/10	0.00%	6/10	60.00%	0/10	0.00%	6/10	60.00%	0/10	0.00%
	HB03	Wetland area behind The Gray's Apartments	1/7	14.29%	3/7	42.86%	0/7	0.00%	4/7	57.14%	1/7	14.29%
	HB02	Entrance to The Gray's Apartments	3/9	33.33%	5/9	55.56%	0/9	0.00%	3/9	33.33%	0/9	0.00%
	FC02	Frierson's Circle	2/10	20.00%	6/10	60.00%	3/10	30.00%	4/10	40.00%	0/10	0.00%
	HBWET01	Wetland area at Vista View Apartments	3/10	30.00%	3/10	30.00%	1/10	10.00%	3/10	30.00%	0/10	0.00%
	MRR02	Drainage ditch next to Cahill's	1/10	10.00%	8/10	80.00%	0/10	0.00%	4/10	40.00%	0/10	0.00%
	FC01	Frierson's Circle	1/9	11.11%	1/9	11.11%	0/9	0.00%	1/9	11.11%	0/9	0.00%
	BP01	Buck Point Road	0/5	0.00%	4/5	80.00%	0/5	0.00%	1/5	20.00%	0/5	0.00%
Heyward Cove	BR01	Drainage ditch near Taylor's Warehouses on Bluffton Rd	2/9	22.22%	4/9	44.44%	0/9	0.00%	0/9	0.00%	0/9	0.00%
	BV01	Drainage ditch at the intersection of Bruin Rd and Pritchard St	1/9	11.11%	5/9	55.56%	0/9	0.00%	1/9	11.11%	0/9	0.00%
	BV02	Drainage ditch at intersection of Hawkes Rd and Pritchard St	1/9	11.11%	2/9	22.22%	0/9	0.00%	0/9	0.00%	0/9	0.00%
	BV03	Drainage ditch at the end of Hawkes Rd	0/9	0.00%	5/9	55.56%	0/9	0.00%	1/9	11.11%	0/9	0.00%
	HWC2	Heyward Cove overpass on Bridge St	4/6	66.67%	6/6	100.00%	1/6	16.67%	1/6	16.67%	0/6	0.00%
Huger Cove	HGC01	Drainage ditch on Lawrence St	4/9	44.44%	6/9	66.67%	1/9	11.11%	0/9	0.00%	0/9	0.00%
	CH01	Ditch that connects behind the promenade to May River Rd	0/1	0.00%	0/1	0.00%	0/1	0.00%	0/1	0.00%	0/1	0.00%
	HGC2	Huger Cove overpass on Bridge St	3/6	50.00%	5/6	83.33%	0/6	0.00%	0/6	0.00%	0/6	0.00%

Verdier Cove	HLP01	Pond on Honey Locust Ave	0/7	0.00%	2/7	28.57%	0/7	0.00%	0/7	0.00%	0/7	0.00%
	SR01	Drainage ditch off Shultz Rd	0/4	0.00%	1/4	25.00%	0/4	0.00%	0/4	0.00%	0/4	0.00%
	SR02	Drainage ditch that leads from Shultz Rd to the ditch behind the Watershed Management Division	0/1	0.00%	0/1	0.00%	0/1	0.00%	0/1	0.00%	0/1	0.00%
	AS01	Pond at corner of Able St and Pin Oak St	0/7	0.00%	1/7	14.29%	0/7	0.00%	1/7	14.29%	0/7	0.00%
	WMD	Drainage ditch adjacent to Watershed building	5/6	83.33%	1/6	16.67%	3/6	50.00%	1/6	16.67%	0/6	0.00%
	WMD2	Beginning of drainage ditch running behind the Watershed building	0/3	0.00%	1/3	33.33%	0/3	0.00%	2/3	66.67%	0/3	0.00%
	WMD3	Middle of drainage ditch running behind the watershed building	2/2	100.00%	0/2	0.00%	1/2	50.00%	1/2	50.00%	0/2	0.00%
	WMD4	Middle of drainage ditch running behind the watershed building	0/1	0.00%	0/1	0.00%	0/1	0.00%	0/1	0.00%	0/1	0.00%
	VC01MH	Verdier Cove outfall on Thomas Heyward St	0/7	0.00%	2/7	28.57%	0/7	0.00%	1/7	14.29%	0/7	0.00%
	VC2	Kayak dock in Stock Farm	0/3	0.00%	1/3	33.33%	0/3	0.00%	0/3	0.00%	0/3	0.00%
	BL01	Manhole in front of 12 and 14 Brenden Ln	0/2	0.00%	0/2	0.00%	0/2	0.00%	0/2	0.00%	0/2	0.00%
	QC01	Manhole in front of 6 and 8 Quinn St	0/2	0.00%	0/2	0.00%	0/2	0.00%	0/2	0.00%	0/2	0.00%

Section XI, Item #1.



Esri, HERE, IPC, Esri, HERE, Garmin, INCREMENT P, USGS, METI/NASA, EPA, USDA

# Town of Bluffton Targeted MST Sampling Locations

## Legend

- Targeted MST Sampling Locations
  - Targeted MST Sampling Locations
- Drainage Channels
  - Drainage Channels
- Jurisdiction
  - BEAUFORT COUNTY
  - BLUFFTON



# TOWN OF BLUFFTON MAY RIVER WATERSHED ACTION PLAN ADVISORY COMMITTEE 2026 Meeting Schedule

MEETING DATES
January 22, 2026
March 9, 2026, 10am - 12:30pm
April 23, 2026
July 23, 2026
October 22, 2026

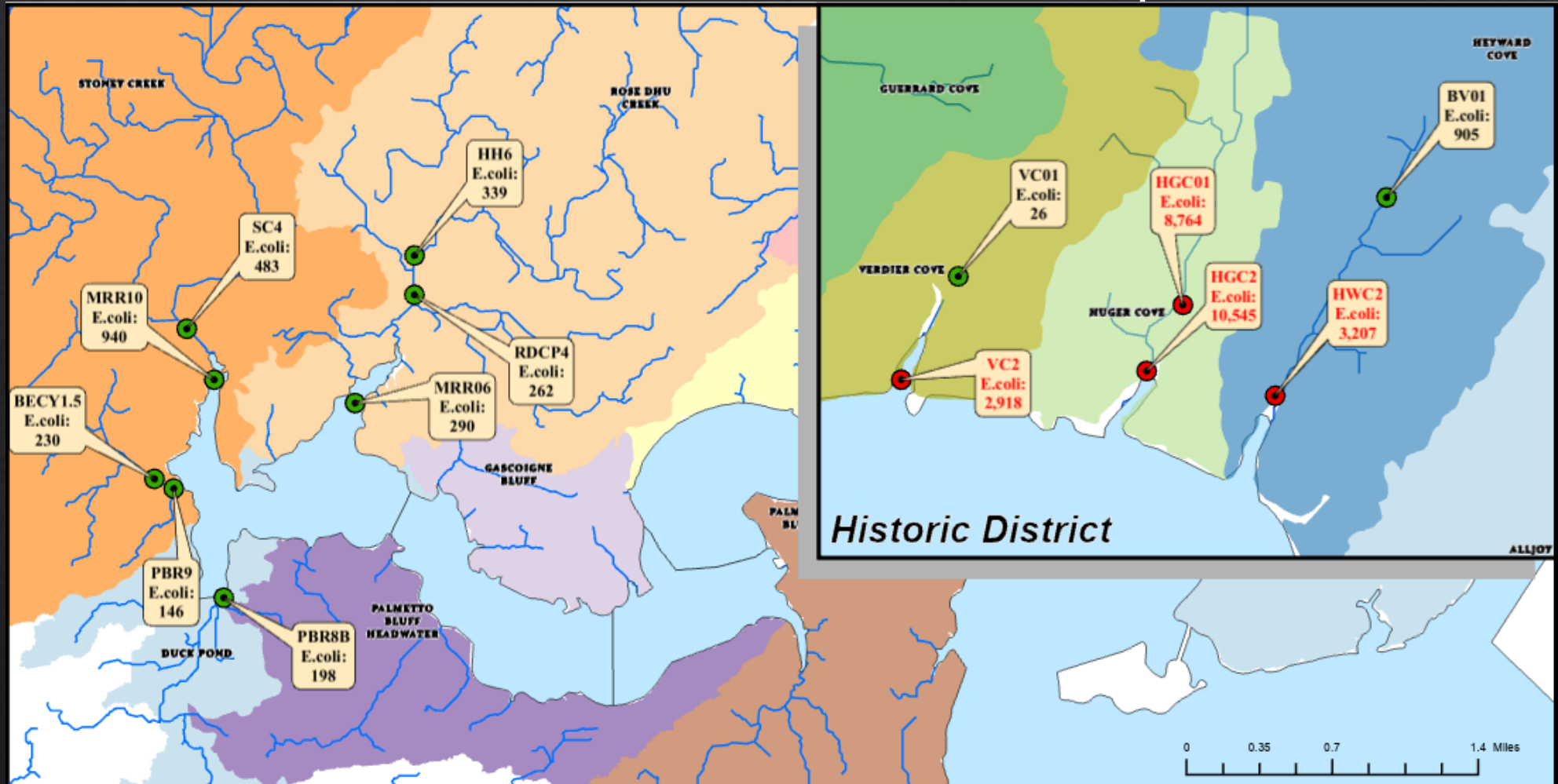
REGULAR MEETINGS ARE HELD THE 4th THURSDAY OF EACH MONTH AT 3:00 P.M.  
**EXCEPT MARCH**

**Please Note:**

Meetings will be held on scheduled meeting dates unless otherwise advertised with FOIA compliance.

APPROVED

# MS4 Minimum Control Measure #3 – IDDE: *E. coli* Concentrations Trend Map



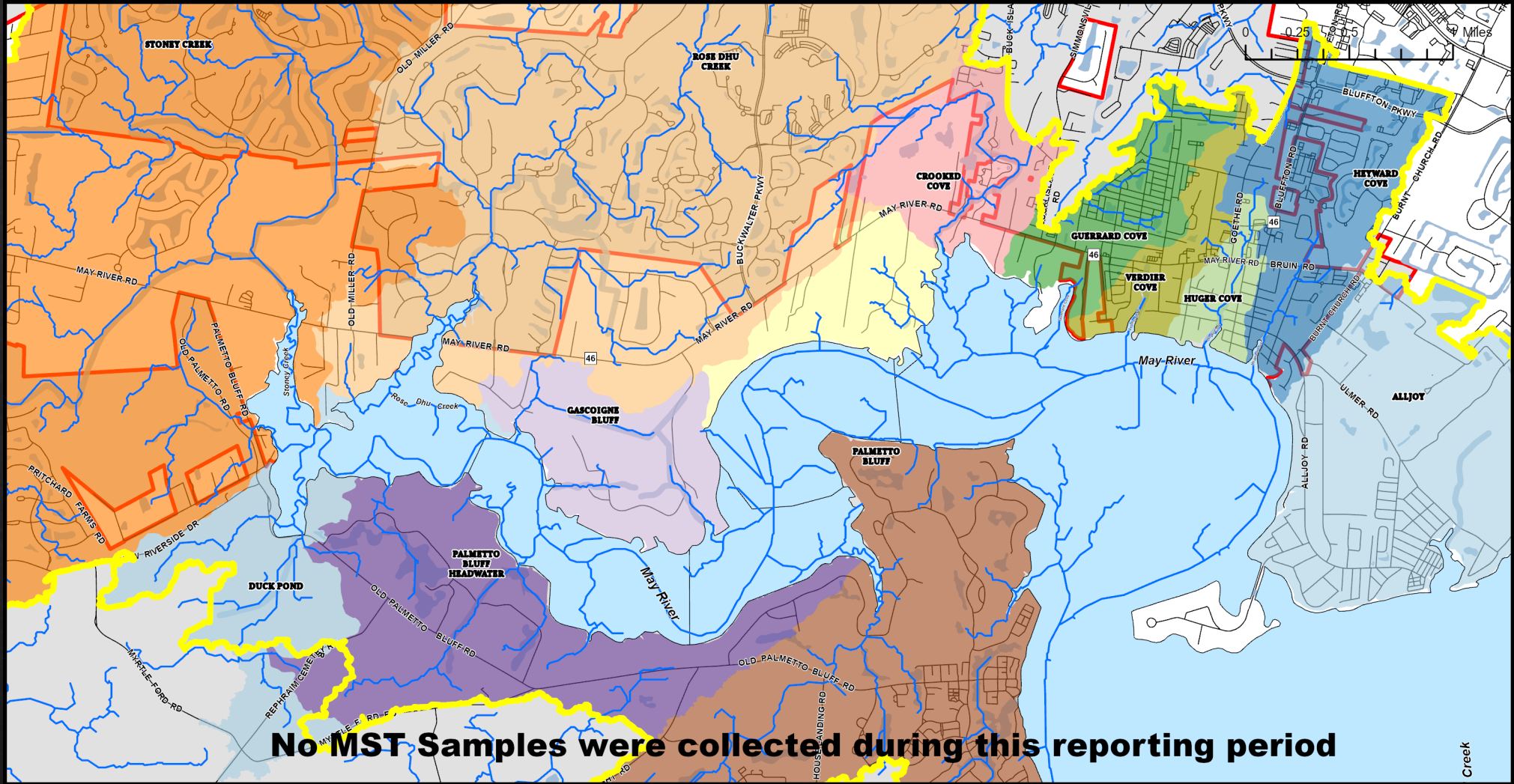
**LEGEND:**  
 ● Sampling Location with Geomean < 1000 cfu/100mL  
 ● Sampling Location with Geomean > 1000 cfu/100mL  
 □ Bluffton  
 □ Beaufort County  
 — Street or Road  
 — River or Creek  
 — Emergent Wetland  
 — Forested Wetland  
 — Drainage Flow Line

**ESCHERICHIA COLI (E. coli) GEOMEANS**  
 Sampling Results for Previous Reporting Period  
 Town of Bluffton  
 Beaufort County, SC



	USCB Water Quality Samples	Microbial Source Tracking Samples	MS4 Quarterly Samples Collected
FY 2026 YTD Totals	1,392	218	84

# MS4 Minimum Control Measure #3 – IDDE: Microbial Source Tracking (MST) Map – By Markers Sources



**No MST Samples were collected during this reporting period**

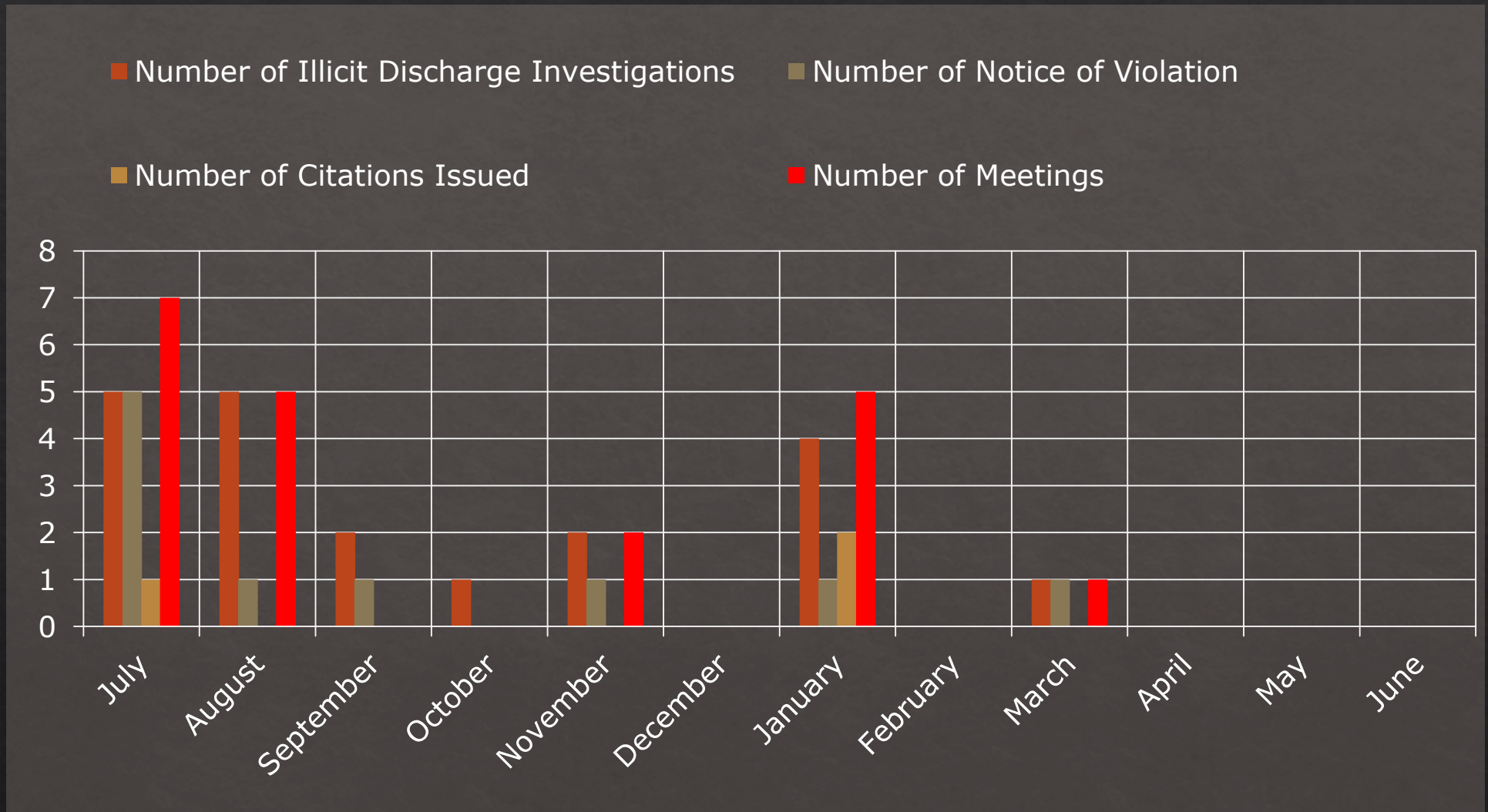
**LEGEND:**

Basins & Subbasins:	Bluffton	Location With MST Detection
Alljoy	Beaufort County	Human
Rose Dhu Creek	May River Watershed	Bird
Stony Creek	River or Creek	Deer
Gascoigne Bluff	Drainage Flow Line	Dog
Palmetto Bluff Headwater	Street or Road	Horse
Palmetto Bluff		Location Without MST Detection
Duck Pond		
Heyward Cove		
Huger Cove		
Guerrard Cove		
Crooked Cove		
Verdier Cove		
Unnamed		

**MICROBIAL SOURCE TRACKING (MST)**  
 Sampling Results for Previous Reporting Period  
 Town of Bluffton  
 Beaufort County, SC

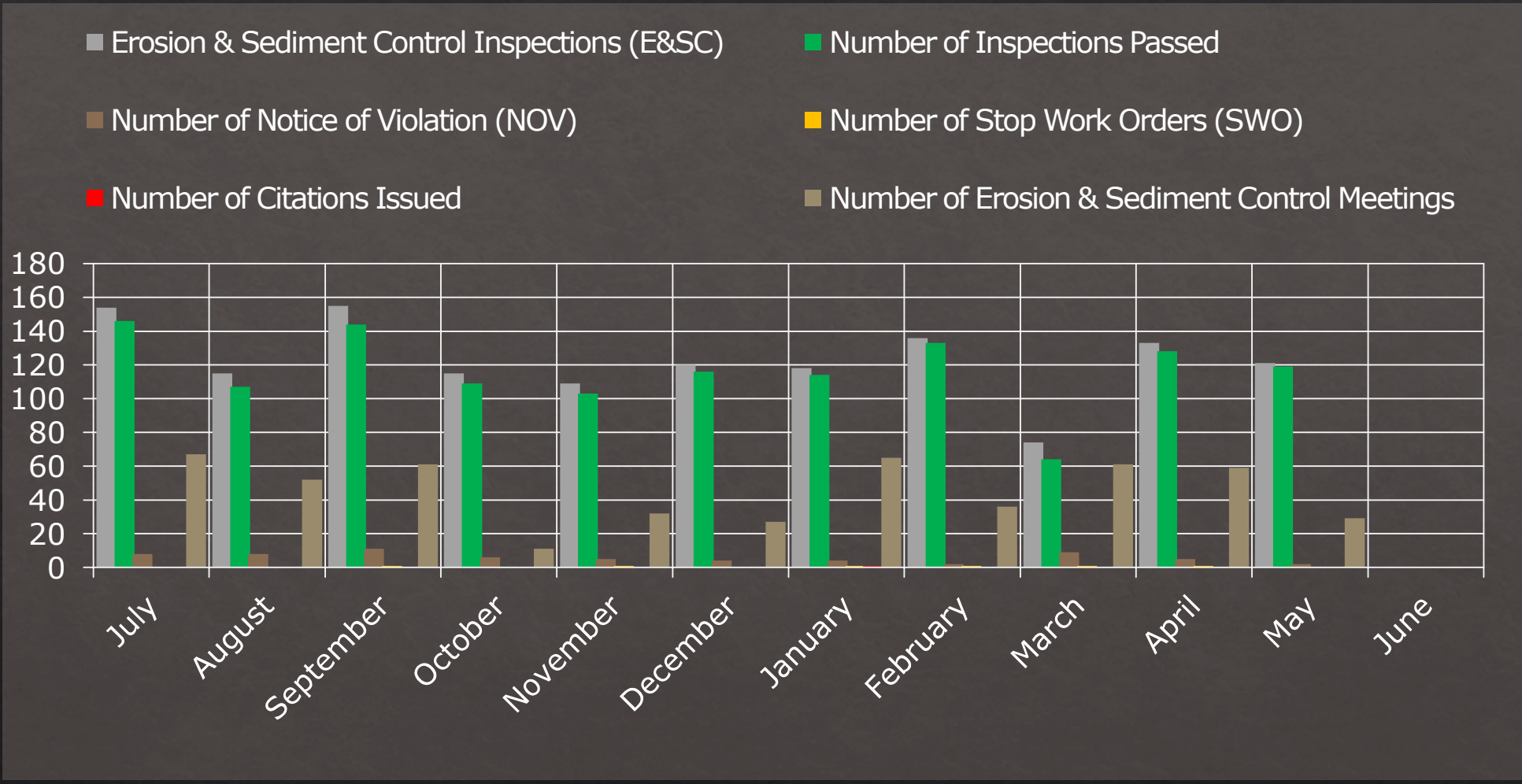


# MS4 Minimum Control Measure #3 – IDDE: Illicit Discharge Investigations



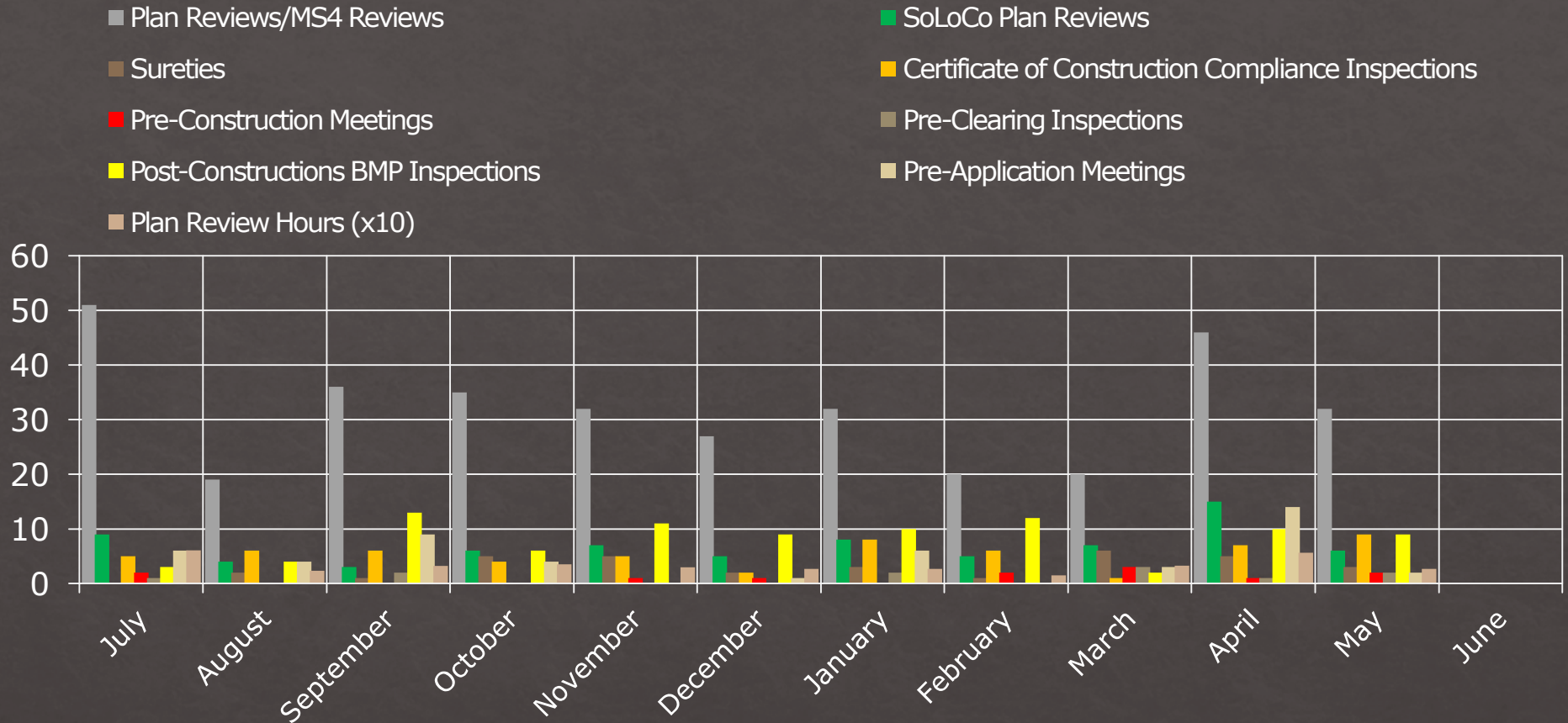
	Number of Illicit Discharge Investigations	Number of Notices of Violation Issued	Number of Citations Issued	Number of Meetings
FY 2026 YTD Totals	20	10	3	20

# MS4 Minimum Control Measure #4 - Construction Site Stormwater Runoff Control



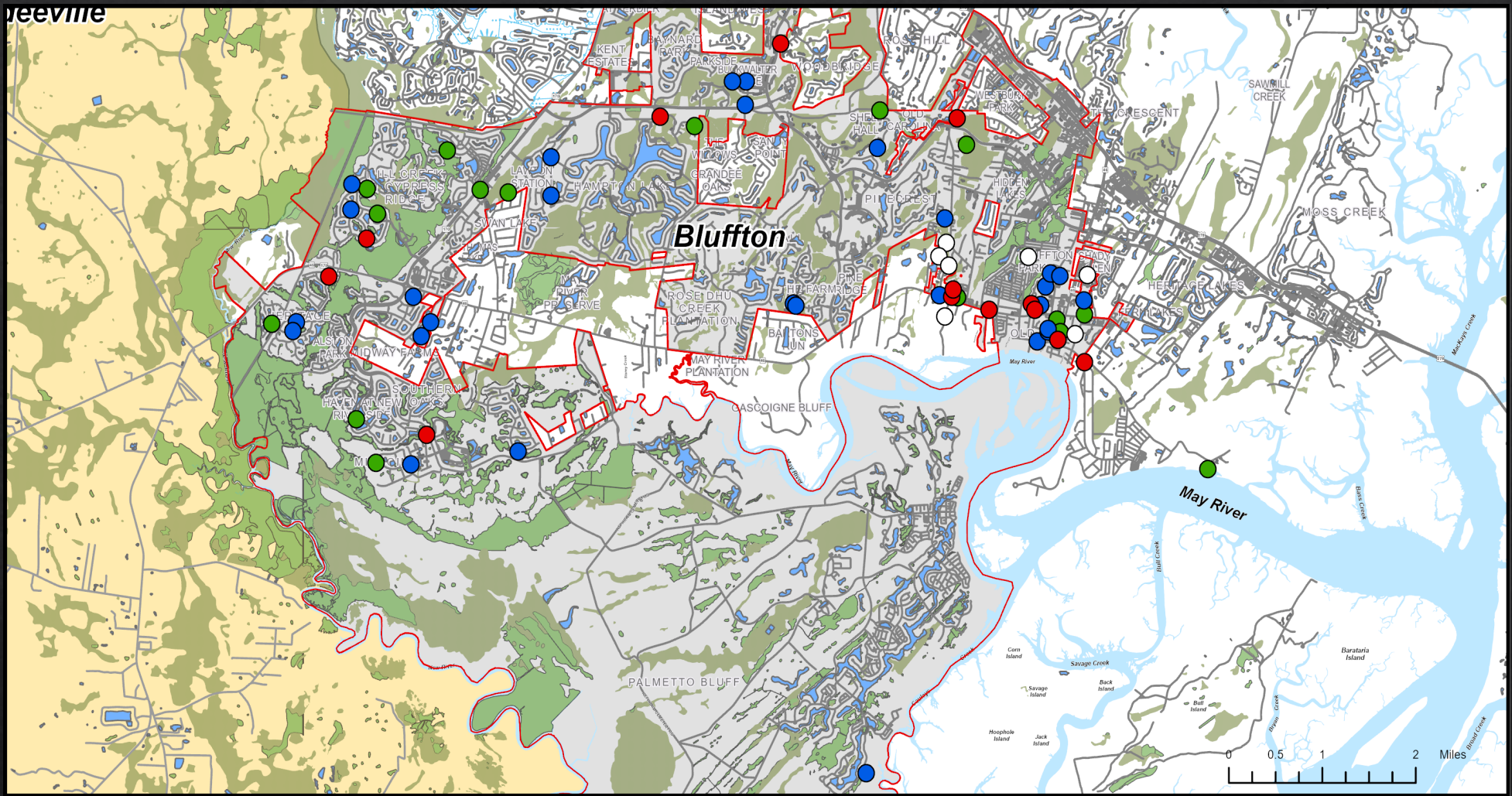
	Number of Sediment & Erosion Control Inspections	Number of Inspections Passed	Number of NOV's Issued	Number of SWO Issued	Number of Citations Issued	Number of E&SC Meetings
FY 2026 YTD Totals	1,350	1,283	64	6	1	500

# 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 2026 YTD	350	75	33	59	12	11	89	49	363.50 Hrs.

# Citizen Request for Watershed Mngt. Services & Activities Map



**LEGEND:**

- Citizen Concerns
- Drainage & Flooding
- Environmental Concerns
- Education & Outreach
- Bluffton
- Beaufort County
- Jasper County
- Street or Road
- River or Creek
- Lagoon or Pond
- Emergent Wetland
- Forested Wetland

## WATERSHED MANAGEMENT ROUTINE SERVICES & ACTIVITIES MAP

Town of Bluffton  
Beaufort County, SC

Updated: 5/15/2026

	Number of Citizen Requests Investigated	Number of Meetings
FY 2026 YTD Totals	94	69

# FY26 CIP Master Project Schedule



Planning\*
  Design\*\*
  Construction\*\*\*

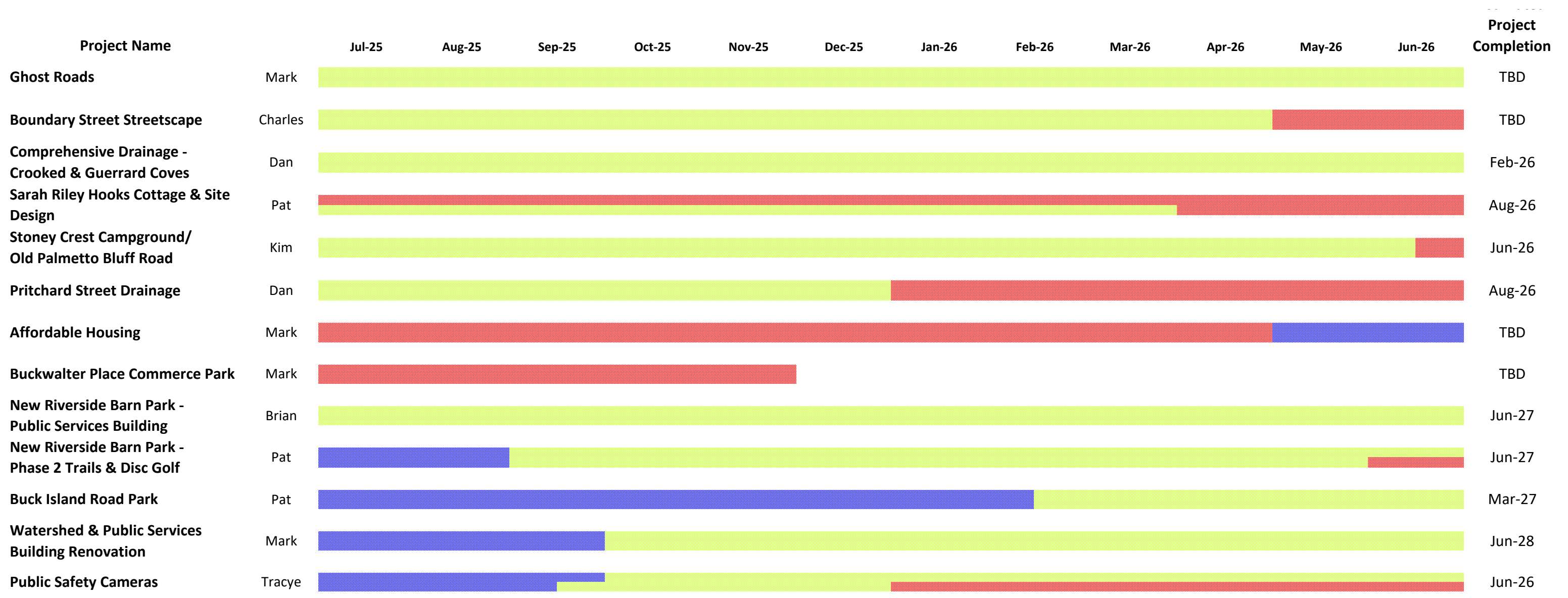
*\*Planning includes surveying, environmental and cultural investigations, initial master planning and other due diligence reports and studies.*

*\*\*Design includes conceptual, preliminary and final design, construction documents, permitting, easement acquisition and bidding.*

*\*\*\*Construction includes contracts, geotechnical reports, all horizontal and vertical construction, construction administration, as-builts and final closeout.*

\*SUBJECT TO CHANGE\*

# FY26 CIP Master Project Schedule



Planning\*
  Design\*\*
  Construction\*\*\*

*\*Planning includes surveying, environmental and cultural investigations, initial master planning and other due diligence reports and studies.*

*\*\*Design includes conceptual, preliminary and final design, construction documents, permitting, easement acquisition and bidding.*

*\*\*\*Construction includes contracts, geotechnical reports, all horizontal and vertical construction, construction administration, as-builts and final closeout.*

\*SUBJECT TO CHANGE\*

**TOWN COUNCIL STAFF REPORT**  
**Public Services Department**



<b>MEETING DATE:</b>	June 9, 2026
<b>SUBJECT:</b>	Public Services Department Monthly Report
<b>DIRECTOR:</b>	Larry Beckler, 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, The Cove 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, Evercore Park.
  
4. **ADDITIONAL ACTIVITIES**
  - Bollards @ Calhoun and May River, Calhoun and Lawrence, Calhoun and Lawton were serviced
  - RCC Deck was washed / Windows Washed / Paint Touch ups / Spray for Wasp’s / New Flag Mount
  - Barricades were all power washed
  - Panic Button Alarm batteries were replaced at Town Hall excluding 015
  - New Sign Holders were installed on numerous poles on Calhoun Street
  - Electrical Checked @ Martin, Dubois and Wright Parks, and On Bridge, Calhoun Streets. Minor repairs made to two and one Outlet was replaced.

- New River Barn Gate damaged for 6th and 7th times. (Same Gate). Gate is now at the welders to identify a long-term solution, if possible, with current design
- Damaged pieces of ride at New River Barn Playground are on order
- Furniture relocated to storage facility for Executive
- Damaged Bollard base at New River Barn was removed and is being repaired. Police report was filed due to damaged wood which cannot be repaired
- Kiosk installed at Welcome Center
- Walkway roof at Town Hall was power washed
- Roof at Town Hall was cleared off of debris
- Oscar Frazier patio power washed
- Street sign at Wharf and May River Straightened – Bollard ordered to protect sign
- Fence at Oyster Factory repaired
- Public works coordinated with Dan (Rotary) and Vendors regarding electrical hook ups. As a result, we had only one electrical issue, this year
- Carriage house at wright family was power washed – roof only
- Public Services yard cleaned of garbage
- Metal salvaged was brought to the recycled , funds received submitted to Finance
- Created planting bed and installed plants around sculpture at Martin Family Park
- Power washed the following Buildings: LEC, Squire Pope House, The Cove
- High School Banners Hung on May River and at the intersection
- Storage shelf for PD was completed and installed
- Police Week Banner was hung
- Oyster Factory Fence Repaired
- AC at LEC was addressed
- Quarterly preventative maintenance performed to all Town HVAC units
- New Golf Cart Entrance was created, and fence installed at Oyster Factory
- Parking spaces for Golf Carts were created. Space used already existed and it was reconfigured.
- Signs for Golf Cart parking installed
- Minor plumbing issues addressed (Fountains & Toilets)
- Various Items hung at Welcome Center
- Wall of Honor Pictures installed temporarily per Marcia
- New Mailbox for Customer Service Installed
- Followed up with Mock about GreenHeck- Ordering new exhaust driver.
- Minor repairs at Substation (Door Sto & Odor issue)
- Repaired Podium at NRB
- Purchased and installed new plantings at Oyster Factory Park and Garvin Garvey House
- Irrigation repairs at Oyster Factory Park
- Installed Memorial Day flags on Bluffton Rd
- Moved furniture at Vicki Smalls office
- No Parking signs installed on Thomas Heyward
- Town property appraisal walk thru with Insurance representative

**5. PREPPING FOR SPECIAL AND CIVIC EVENTS**

- Set-up & support for following events:
  - Farmers Market- Martin Family Park
  - Prepped for Mobile Symposium, Bluffton: Legends & Loes Town of Bluffton Welcome Center
  - Prepped for National Day of Prayer – Buckwalter Place Park @ Veterans Memorial (6 – until)
  - Prepped for Mayfest – Martin Family Park
  - Prepped for Sunset Party (Oyster Factory Park)
  - Prepped for Town of Bluffton Movie Night Lilo and Stitch (Martin Family Park)
  - Prepped for Flow and Flourish Community Yoga and Pilates Market (BP Veteran’s Memorial 9-1)
  - Town property appraisal walk thru with Insurance representative

**6. EQUIPMENT & MAINTENANCE REPAIR**

- Completed modifications and repairs on the Water Buffalo
- Fabricated edging for landscape at art sculpture at Martin Family Park
- Fixed tailgate on landscape trailer
- Fabricated ramp support arm for large equipment trailer
- Repairs to edger and string trimmer
- Fabricated & installed cubby box for LEC Gym
- Fabricated backers for all signs
- Change blades on 3 gang mower and one Kubota Mower
- Fabricated stands for Water Shed informational signs (5 units)

**7. TRAINING**

- Staff completed weekly training topics
- David Mack, Abdiel Maldonado & Tony Martinez attended The Hilton Head Island Organic-First Integrated Pest Management Field Day
- Colleen Hall attended Cartegraph training & convention in Chicago
- Yearly Hurricane Preparedness Training

**8. BEAUTIFICATION COMMITTEE**

- Agenda & Minutes Attached

**9. ATTACHMENTS**

- Public Services Monthly Cost Report – (Below)

**Public Services Monthly Cost Reports – April 2026** *(Cost Includes Labor & Equipment)*

<b>ASSETS AND EVENTS</b>	<b>COST</b>
FACILITIES	\$3,147.00
PARKS	\$15,890.00
ROADS AND TRAILS	\$8,821.00
SPECIAL EVENTS	\$2,680.00

# Beautification Committee Meeting

Theodore D. Washington Municipal Building, Okatie River Conference Room, 20 Bridge Street,  
Bluffton, SC

April 16, 2026

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## I. CALL TO ORDER

Chairman Johnny Bowen called the meeting to order at 9:00 AM.

## II. ROLL CALL

PRESENT

Chairman Johnny Bowen

Vice Chari Dot Jeger

Dan Ciufreda

Jessica Palladino

Hugh Williamson

## III. ADOPTION OF MINUTES

Chairman Bowen made a motion to approve February 19, 2026 minutes as written.

Motion seconded by Dan Ciufreda.

Voting Yea: Vice Chair Jeger, Jessica Palladino and Hugh Williamson.

All were in favor and the motion passed.

## IV. PUBLIC COMMENT

Committee welcomed Shemeica Williams from the Hilton Head Chamber of Commerce.

## V. OLD BUSINESS

### 1. Paint Out Pollution Storm Drain Art Project Update

Committee reviewed the final four designs chosen by the Art Committee. The selected submissions are from River Ridge Academy, Bluffton High School, Hilton Head Christian Academy and Cross Schools. The Art Committee will be seeking final project approval at the next Town Council Meeting scheduled for Tuesday, May 12, 2026.

### 2. Linear Trail Renovation Update

Paving delayed until August. Estimated completion date for the Linear Trail is late summer.

### 3. White Goods Pickup Update

Scheduled for April 16 and 17. Committee reviewed flyers that were distributed to residents along pickup locations: Buck Island Rd, Goethe Rd, Maiden Ln, Scultz Rd and Simonsville Rd. Public Services Department will patrol those locations on scheduled pickup dates.

### 4. Arbor Day Tree Planting on Friday, April 24, 2026.

Two 8 inch caliper live oak trees were ordered from the Greenery. 2026 Arbor Day plaques ordered from Sign D'Sign. Planting of live oak trees and installation of commemorative plaques will take place at Town Hall on Friday, April 24, 2026.

#### 5. Rotary Center Pet Waste Donation Update

Town Council granted approval for Public Services to match Rotary Club's donation up to \$1,000.00. Dan Ciufreda to submit project for final approval to Rotary Club of Bluffton.

#### 6. Butterfly Garden Contract Update

Contracted maintenance of the Butterfly Garden by the Greenery was extended through the end of fiscal year 2026 and will end on June 30, 2026.

### VI. NEW BUSINESS

#### 1. Town of Bluffton Scavenger Hunt Idea

#### 2. Installation of Shade Coverings and Solar Powered Receptacles at Town Benches

Committee agreed that it would be beneficial to install solar powered receptables at Town Park pavilions instead of benches along Town roads.

#### 3. Replace Oscar Frazier Pavilion Mural

Committee discussed the idea of limiting artwork solicitations to Bluffton Elementary Schools only. Dot Jeger to write up project proposal to submit to Art Committee.

### VII. DISCUSSION

1. Committee discussed the idea of installing a swing along the New River Linear Trail. Colleen Hall to solicit quotes for purchasing a swing and verifying locations along the trail where installation is allowed. Dominion Energy maintains right of way along the path, request location suggestions from Constance Clarkson of CIP.

2. Jessica Palladino suggested that the Town participate in the National Wildlife Federation's Mayors' Monarch Pledge. This tri-national program commits local government leaders across North America to creating healthy habitats for the monarch butterfly and other pollinators in order to combat the steady decline of the monarch butterfly. Committee discussed using funds to purchase milkweed to distribute to local residents. Deadline for signing the pledge is April 30, 2026. Jessica Palladino to write up proposal.

### VIII. ADJOURNMENT

Chairman Bowen adjourned the meeting at 9:45AM.

**NEXT MEETING DATE: THURSDAY, MAY 21, 2026**



# Beautification Committee Meeting

Thursday, May 21, 2026 at 9:00 AM

Theodore D. Washington Municipal Building, Okatie River Conference Room, 20 Bridge Street,  
Bluffton, SC

## AGENDA

**I. CALL TO ORDER**

**II. ROLL CALL**

**III. ADOPTION OF MINUTES**

**IV. PUBLIC COMMENT**

**V. OLD BUSINESS**

1. Storm Drain Art Project Update
2. Linear Trail Renovation Update
3. White Goods Pickup Update
4. Arbor Day Tree Planting Update
5. Rotary Center Pet Waste Donation Update
6. Solar Powered Charging Stations
7. Replacement of Oscar Frazier Pavilion Mural

**VI. NEW BUSINESS**

1. FY 2026 Budget Expenditure Review

**VII. DISCUSSION**

**VIII. ADJOURNMENT**

**NEXT MEETING DATE: THURSDAY, JUNE 18, 2026**

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

*Public comment is limited to 3 minutes per speaker.*



## Director's Report – Don Ryan Center for Innovation (DRCI)

May 2026

### Overview:

May was a month of continued momentum and strategic growth for the Don Ryan Center for Innovation (DRCI). The organization advanced tenant activity at The COVE, expanded mentor engagement, and continued building AI education initiatives and entrepreneurial programming. DRCI strengthened regional partnerships through events, workshops, and networking while continuing to refine internal program structure and business support services.

### Entrepreneur Program Update

- First meeting with High Tide Pediatric Dentistry
- Signed new STARTUP company scheduled to begin at the end of the month
- Kickoff meetings held for Airbana Technical Solutions and Keora Finance
- AMA Private Dining/Lucky Fig strategic meeting regarding physical location launch

### STARTUP Companies

- **OPFOB**
- **Part of the Family**
- **AMA Private Dining**
- **Bright Beginnings Academy**
- **Belleau Woods Tavern (HEROES)**
- **Buysight.ai**
- **221B Studios**
- **Rosano**
- **Airbana (New - HEROES)**
- **High Tide Pediatric Dentistry (New)**
- **Keora Finance (New)**

### GROWTH Companies

- **Effervescence Yoga**

## THRIVE Companies

Ongoing long-term work with established Growth companies

- **Universal Bookkeeper**
- **HardeeGreens (Hardeeville)**
- **Delta Roofing**

## Mentor Program

- Met with and onboarded several new mentors
- Signed on two additional mentors with Healthcare and Legal experience
- Continued mentor engagement and alignment for expanding programs

## Operations, Economic Development, Events and Meetings:

- Prepared lease presentation materials and Town Council memorandum for The COVE
- Executed Landing Pad leases for Chase and Mashburn
- Chase Bank moved into The COVE Landing Pad office
- Mashburn Construction moved into The COVE Landing Pad office
- Continued lease updates and negotiations related to The COVE
- Finished and posted first reading packet for Project Helicopter EDIP
- Finished and posted second reading packet for Bluff Ortho EDIP
- Furniture discussions for The COVE with CBI and Interior Elements
- Hosted GBCC Coffee & Connections at The HUB
- Hosted GBCC Lunch & Learn
- Hosted HHI-Bluffton Chamber Candidate Recruitment Forum
- Attended Hilton Head-Bluffton Chamber Executive Networking Event
- Continued planning for next Founders Forum event in June
- Conducted DRCI Board work, preparation, and candidate review for open board seat
- Participated in Shop Local meeting with Hardeeville
- Continued work on signage for The COVE
- Continued DRC logo revision work
- Participated in Hurricane Preparedness meeting
- BHS marketing capstone presentations and postmortem review meeting
- Hosted AI in Business Training
- Continued AI Education Series at The HUB
- Continued AI-focused entrepreneurial and business support initiatives

**Partnerships**

**Key Collaborations:**

- **Hardeeville:** Continued joint marketing planning efforts with Hardeeville. Working on Shop Local Video and Lunch and Learn for October
- **Beaufort County Economic Development Corporation:** BCEDC temporarily moved to the Landing Pad to allow more space at The HUB. Ongoing collaboration on multiple impactful projects. Attended board meeting.
- **Greater Bluffton Chamber:** Participated in numerous ribbon cuttings, showcasing the growth and expansion of local businesses and attended. Hosted several GBCC events at The HUB and The COVE.
- **Hilton Head – Bluffton Chamber:** Participated in ribbon cuttings and networking events
- **Hispanic Business Association of the Lowcountry:** Ongoing membership, Paul Arvantides is a member of the HBA Lowcountry Partnerships Committee
- **Beaufort County Airport Board:** David Nelems is a member of this Board



# GROWTH MANAGEMENT UPDATE

June 9, 2026

## 1. Town Council Appointed Boards/Commissions/Committees/Citizen Group Meetings:

- a. **Planning Commission:** May 27, 2026, meeting agenda attached. Next meeting scheduled for Wednesday, June 24, 2026.
- b. **Historic Preservation Commission:** May 6, 2026, meeting agenda attached. Next meeting scheduled for Wednesday, June 3, 2026.
- c. **Board of Zoning Appeals:** May 5, 2026, cancellation notice attached. Next meeting scheduled for Tuesday, June 2, 2026.
- d. **Development Review Committee:** May 20 & 27, 2026, meeting agendas attached. May 6 & 13, 2026 cancellation notices attached. Next meeting scheduled for Wednesday, June 3, 2026.
- e. **Historic Preservation Review Committee:** May 4, 11, 18 & 26, 2026 cancellation notices attached. Next meeting scheduled for Monday, June 1, 2026.
- f. **Construction Board of Adjustment and Appeals:** May 26, 2026, cancellation notice attached. Next meeting scheduled for Tuesday, June 23, 2026.
- g. **Affordable Housing Committee:** May 14, 2026, cancellation notice attached. Next meeting scheduled for Thursday, June 4, 2026.

## 2. Community Development / Affordable Housing Committee Work Program:

The budget for the Neighborhood Assistance Program for FY 2026 has been approved at \$400,000 by Town Council. An award in the amount of \$50,000 was granted by Beaufort Jasper Housing Trust Fund bringing the 2026 fiscal year budget to \$450,000.

Fiscal Year 2026 will end on June 30th. To date 38 homes have received assistance from the Neighborhood Assistance Program, for minor/major repairs ranging from entry steps to complete reroofs. A total of \$424,337.13 has been spent. Four homes have received property clean up assistance at a total of \$2,391.84. Three homes have received assistance with tree care at a total of \$2,791.25.

To date 45 homes have received assistance and a grand total of \$429,520.22 has been spent.

Applications are still being received but will not be income verified until FY27 begins.

**ATTACHMENTS:**

1. Planning Commission meeting agenda for May 27, 2026.
2. Historic Preservation Commission meeting agenda for May 6, 2026.
3. Board of Zoning Appeals cancellation notice for May 5, 2026.
4. Development Review Committee meeting agendas for May 20 & 27, 2026.  
Cancellation notices for May 6 & 13, 2026.
5. Historic Preservation Review Committee cancellation notices for May 1, 11, 18 & 26, 2026.
6. Construction Board of Adjustments and Appeals cancellation notice for May 26, 2026.
7. Affordable Housing Committee cancellation notice for May 14, 2026.
8. Building Permits and Planning Applications:
  - a. Building Permits Issued FY 2019-2026 (to May 19, 2026).
  - b. Building Permits Issued Per Month FY 2019-2026 (to May 19, 2026).
  - c. Value of Construction FY 2019-2026 (to May 19, 2026).
  - d. New Single Family Residential Building Permits Issued Per Month FY 2019-2026 (to May 19, 2026).
  - e. New Single Family Residential Building Permits Issued by Neighborhood FY 2019-2026 (to May 19, 2026).
  - f. New Single-Family Certificates of Occupancy Issued by Neighborhood FY 2019-2026 (to May 19, 2026).
  - g. New Commercial Construction/Additions Heated Square Footage FY 2019-2026 (to May 19, 2026).
  - h. Planning and Community Development Applications Approved FY 2019-2026 (to May 19, 2026).
  - i. Multi Family Apartments Value FY 2019-2026 (to May 19, 2026).
  - j. Multi Family Apartments Square Footage FY 2019-2026 (to May 19, 2026).
  - k. Multi Family Apartments Total Units FY 2019-2026 (to May 19, 2026).



## Planning Commission Meeting

Wednesday, May 27, 2026 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 Sparklight Channel 9 and 417 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 22, 2026 Minutes

**V. PUBLIC COMMENT**

**VI. OLD BUSINESS**

**VII. NEW BUSINESS**

- 1. **Unified Development Ordinance Amendments (Public Hearing):** Consideration of Amendments to the Town of Bluffton’s Municipal Code of Ordinances, Chapter 23, Unified Development Ordinance, Article 5 – Design Standards, Sec. 5.10 Stormwater; and Article 9 – Definitions and Interpretation, Sec. 9.2 Defined Terms. (Staff – Andrea Moreno)
- 2. **Beaufort Memorial Primary Care at May River Crossing (Certificate of Appropriateness - Highway Corridor Overlay District):** A request by Josie Abrams of Josie S. Abrams Architecture, on behalf of property owner Beaufort Memorial Hospital for approval of a Certificate of Appropriateness - HCOD application. The project consists of the 5,000 SF single story medical office building with associated infrastructure. The property is zoned Jones Estate Planned Unit Development (PUD) and consists of approximately 1.38 acres identified by tax map number R610 036 000 3212 0000 located within the May River Crossing Master Plan. (COFA-02-26-020148) (Staff - Angie Castrillon)

- 3. Chipotle at May River Crossing (Certificate of Appropriateness - Highway Corridor Overlay District):** A request by Joshua Bookhout of Wilkus Architects, on behalf of property owner PBC Partners, LLC, for approval of a Certificate of Appropriateness - HCOD application. The project consists of the construction of a single-story 2,385 SF restaurant with associated infrastructure. The property is within the Jones Estate Planned Unit Development (PUD) consists of 1.51 acres identified by tax map number R610 036 000 3211 0000 within the May River Crossing Master Plan. (COFA-02-26-020127) (Staff - Angie Castrillon)
- 4. New Riverside Village Parcel 4B-3C (Development Plan):** A request by Griffin Savedge of Thomas and Hutton on behalf of property owner S70 Royce Group, LLC for approval of a Preliminary Development Plan application. The project consists of the construction of two (2) two-story commercial buildings totaling 20,000 SF with associated infrastructure. The property is within the New Riverside Planned Unit Development (PUD) consists of 2.35 acres identified by tax map number R610 036 000 3702 0000 within the New Riverside Village Master Plan at the intersection of New Riverside Village Way and Parkside Commons. (DP-03-26-020155) (Staff - Dan Frazier)
- 5. Maiden Lane Development (Development Plan):** A request by Nathan Sturre of Sturre Engineering, on behalf of property owner Hinton Vacation Properties for approval of a Preliminary Development Plan application. The project consists of nine (9) single-family residential lots with common open area 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 south of Bruin Road west of Pritchard Street. (DP-03-26-020162) (Staff - Dan Frazier)

#### VIII. DISCUSSION

#### IX. ADJOURNMENT

**NEXT MEETING DATE: Wednesday, June 24, 2026**

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

*Public comment is limited to 3 minutes per speaker.*



# Historic Preservation Commission Meeting

Wednesday, May 06, 2026 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 Sparklight Channel 9 and 417 or on Spectrum Channel 1304.

**I. CALL TO ORDER**

**II. ROLL CALL**

**III. NOTICE REGARDING ADJOURNMENT**

The Historic Preservation 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. March 4, 2026 Minutes

**V. PUBLIC COMMENT**

**VI. OLD BUSINESS**

**VII. NEW BUSINESS**

- 1. **Certificate of Appropriateness (204 Bluffton Road):** A request by Thomas Michaels, Jr. (SM7 Design, LLC), Applicant, on behalf of 204 Bluffton Road, LLC, Owner, for approval of a Certificate of Appropriateness to allow the construction of a 3-story 3,978 SF Main Street Building at 204 Bluffton Road. The property is in the Promenade development in Old Town Historic District and zoned Neighborhood Core-Historic District (NC-HD). (COFA-12-25-020072) (Staff-Charlotte Moore)

**VIII. DISCUSSION**

- 1. Historic District Monthly Update. (Staff)

**IX. ADJOURNMENT**

**NEXT MEETING DATE: Wednesday, June 3, 2026**

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# **PUBLIC NOTICE**

The Board of Zoning Appeals (BZA)  
Meeting scheduled for

Tuesday, May 5, 2026 at 6:00 p.m.

Has been CANCELED  
due to a lack of agenda items.

The next meeting is scheduled for Tuesday,  
June 2, 2026.

If you have questions, please contact  
Growth Management at: 843-706-4500



# **PUBLIC NOTICE**

THE DEVELOPMENT REVIEW  
COMMITTEE (DRC)  
Meeting scheduled for

Wednesday, May 6, 2026 at 1:00 P.M.

has been CANCELED  
due to a lack of agenda items.

The next meeting is scheduled for  
Wednesday, May 13, 2026.

If you have questions, please contact  
Growth Management at: 843-706-4500



# **PUBLIC NOTICE**

THE DEVELOPMENT REVIEW  
COMMITTEE (DRC)  
Meeting scheduled for

Wednesday, May 13, 2026 at 1:00 P.M.

has been CANCELED  
due to a lack of agenda items.

The next meeting is scheduled for  
Wednesday, May 20, 2026.

If you have questions, please contact  
Growth Management at: 843-706-4500



## Development Review Committee Meeting

Wednesday, May 20, 2026 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. **19 Towne Drive (Development Plan Amendment):** A request by Daniel Gaines of Gaines Engineering & Design, on behalf of property owner SGA Dental Partners for approval of a Development Plan Amendment application. The project consists of the renovation and addition to the existing dental office and associated landscaping. The property is within the Belfair Planned Unit Development (PUD) and consists of approximately 1.65 acres identified by tax map number R610 031 000 1086 0000 within the Belfair PUD Master Plan. (DPA-04-26-020215) (Staff - Dan Frazier)

**VI. DISCUSSION**

**VII. ADJOURNMENT**

**NEXT MEETING DATE: Wednesday, May 27, 2026**

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## Development Review Committee Meeting

Wednesday, May 27, 2026 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. **Haigler Blvd. Townhomes (Development Plan):** A request by Nathan Sturre of Sturre Engineering, on behalf of property owner Antoine Iskandar of Zakki, LLC, for review of a Preliminary Development Plan application. The project consists of 16 townhome units with common open area and associated infrastructure. The property is within the Residential General (RG) Zoning District and consists of approximately 1.94 acres identified by tax map number R610 039 000 0969 0000. (DP-04-26-020235) (Staff - Dan Frazier)

**VI. DISCUSSION**

**VII. ADJOURNMENT**

**NEXT MEETING DATE: Wednesday, June 3, 2026**

*“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](mailto: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 REVIEW COMMITTEE (HPRC)**

Meeting scheduled for

Monday, May 4, 2026 at 4:00 P.M.

has been CANCELED  
due to lack of agenda items.

The next meeting is scheduled for  
Monday, May 11, 2026.

If you have questions, please contact  
Growth Management at: 843-706-4500



# **PUBLIC NOTICE**

## **THE HISTORIC PRESERVATION REVIEW COMMITTEE (HPRC)**

Meeting scheduled for

Monday, May 11, 2026 at 4:00 P.M.

has been **CANCELED**  
due to lack of agenda items.

The next meeting is scheduled for  
Monday, May 18, 2026.

If you have questions, please contact  
Growth Management at: 843-706-4500



# **PUBLIC NOTICE**

## **THE HISTORIC PRESERVATION REVIEW COMMITTEE (HPRC)**

Meeting scheduled for

Monday, May 18, 2026 at 4:00 P.M.

has been CANCELED  
due to lack of agenda items.

The next meeting is scheduled for  
Tuesday, May 26, 2026.

If you have questions, please contact  
Growth Management at: 843-706-4500



# **PUBLIC NOTICE**

## **THE HISTORIC PRESERVATION REVIEW COMMITTEE (HPRC)**

Meeting scheduled for

Tuesday, May 26, 2026 at 4:00 P.M.

has been CANCELED  
due to lack of agenda items.

The next meeting is scheduled for  
Monday, June 1, 2026.

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 26, 2026, at 6:00 P.M.

has been CANCELED  
due to lack of agenda items.

The next meeting is scheduled for  
Tuesday, June 23, 2026.

If you have questions, please contact  
Growth Management at: 843-706-4500



# PUBLIC NOTICE

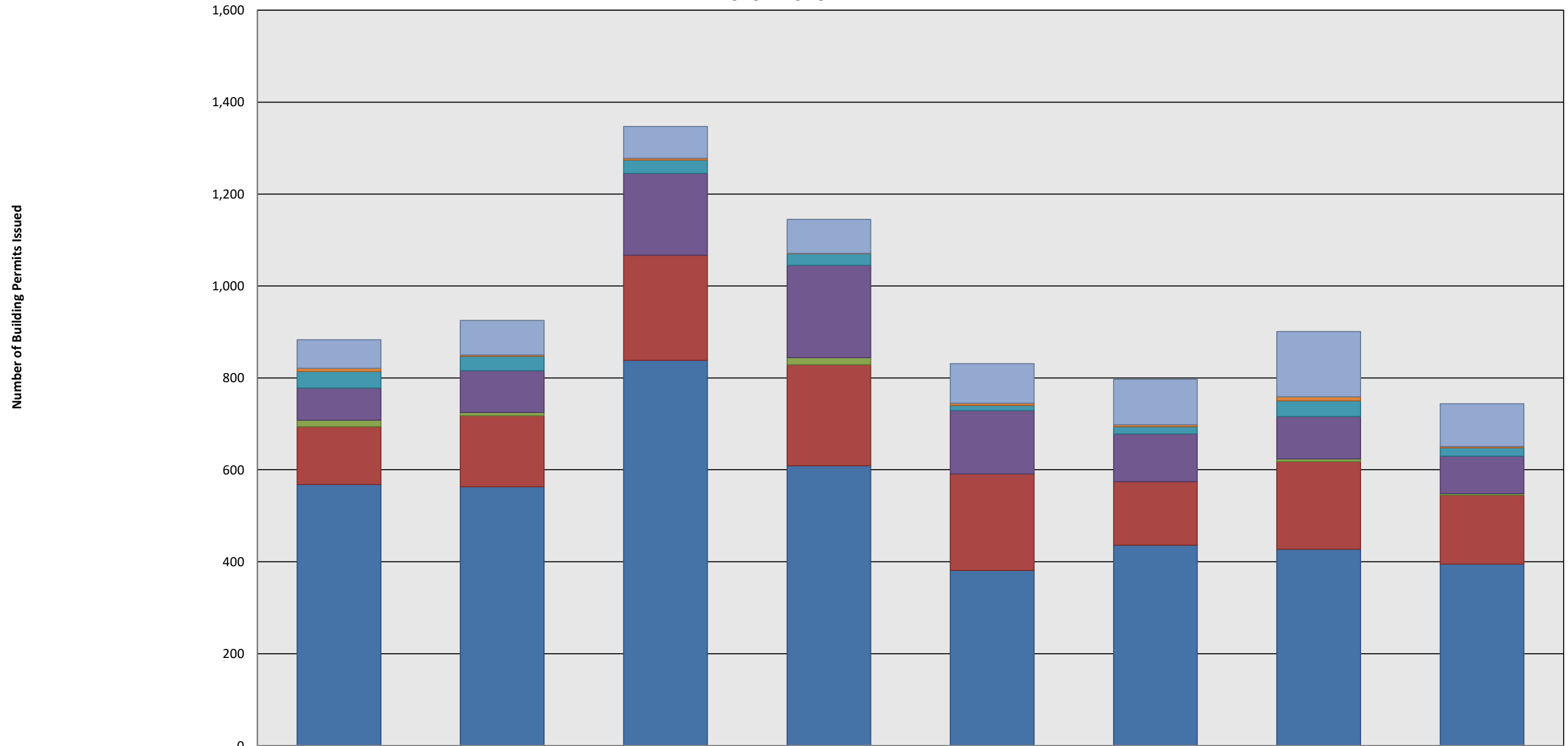
The Affordable Housing  
Committee (AHC)  
meeting scheduled for

Thursday, May 14, 2026, at  
10:00 A.M.

**Has been CANCELLED.**  
**Due to lack of new business.**  
The next meeting is scheduled for  
Thursday, June 4, 2026

If you have questions, please contact  
Growth Management at: 843-706-4500

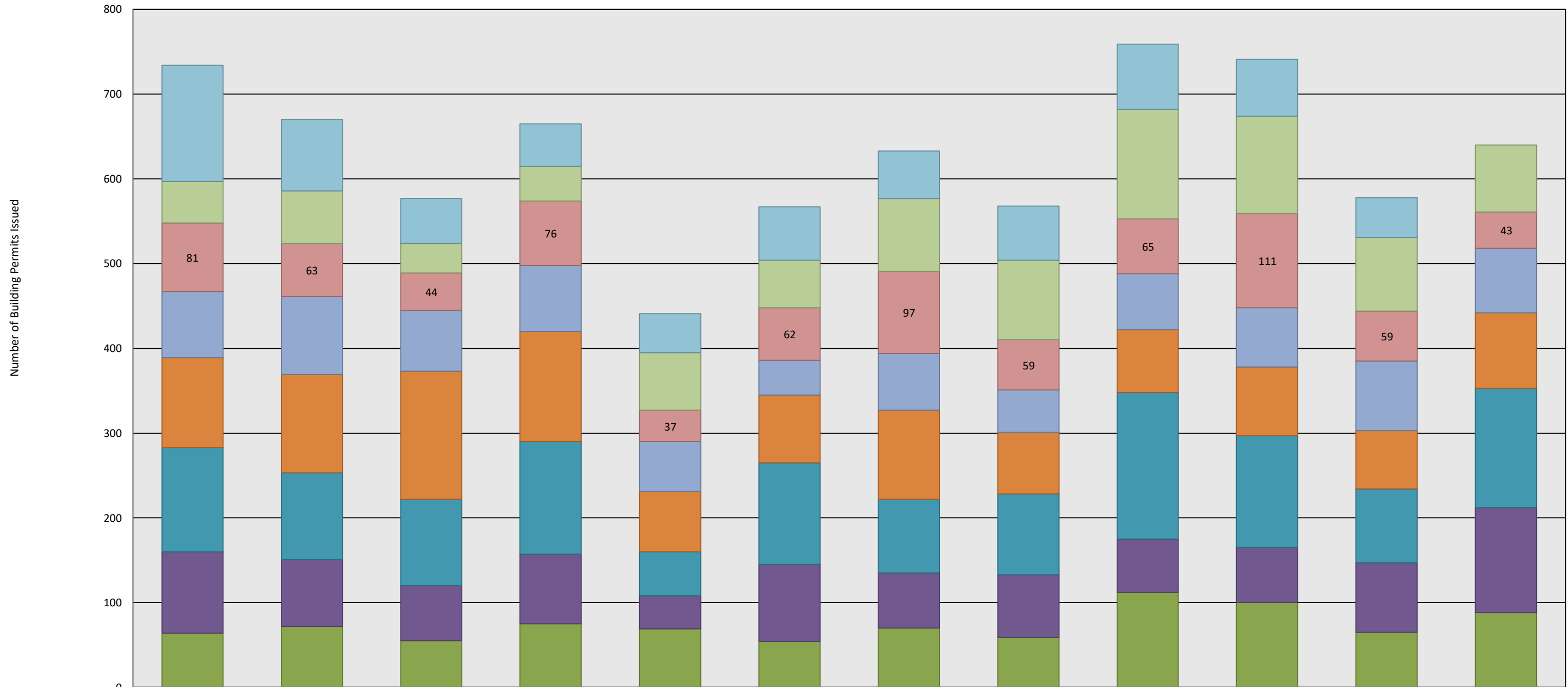
**Town of Bluffton  
Building Permits Issued  
FY 2019 - 2026**



Year	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)	FY 2025 (July 2024- June 2025)	FY 2026 (July 2025 - June 2026)
Other Commercial	62	75	69	74	86	99	142	93
Commercial Addition	7	3	4	1	5	4	9	3
New Commercial Construction/ Tenant Upfit	36	31	29	25	11	16	34	18
Other Residential	70	91	178	201	138	104	92	82
New Multi Family - Apartments	14	7	0	15	0	0	6	3
Residential Addition	126	155	229	220	210	138	191	150
New Single Family	568	563	838	609	381	436	427	395

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. Commercial addition includes: additions, screen enclosure, shell.  
 5. Other commercial includes: remodel and accessory structure.

**Town of Bluffton**  
**Building Permits Issued Per Month**  
**FY 2019 - 2026**

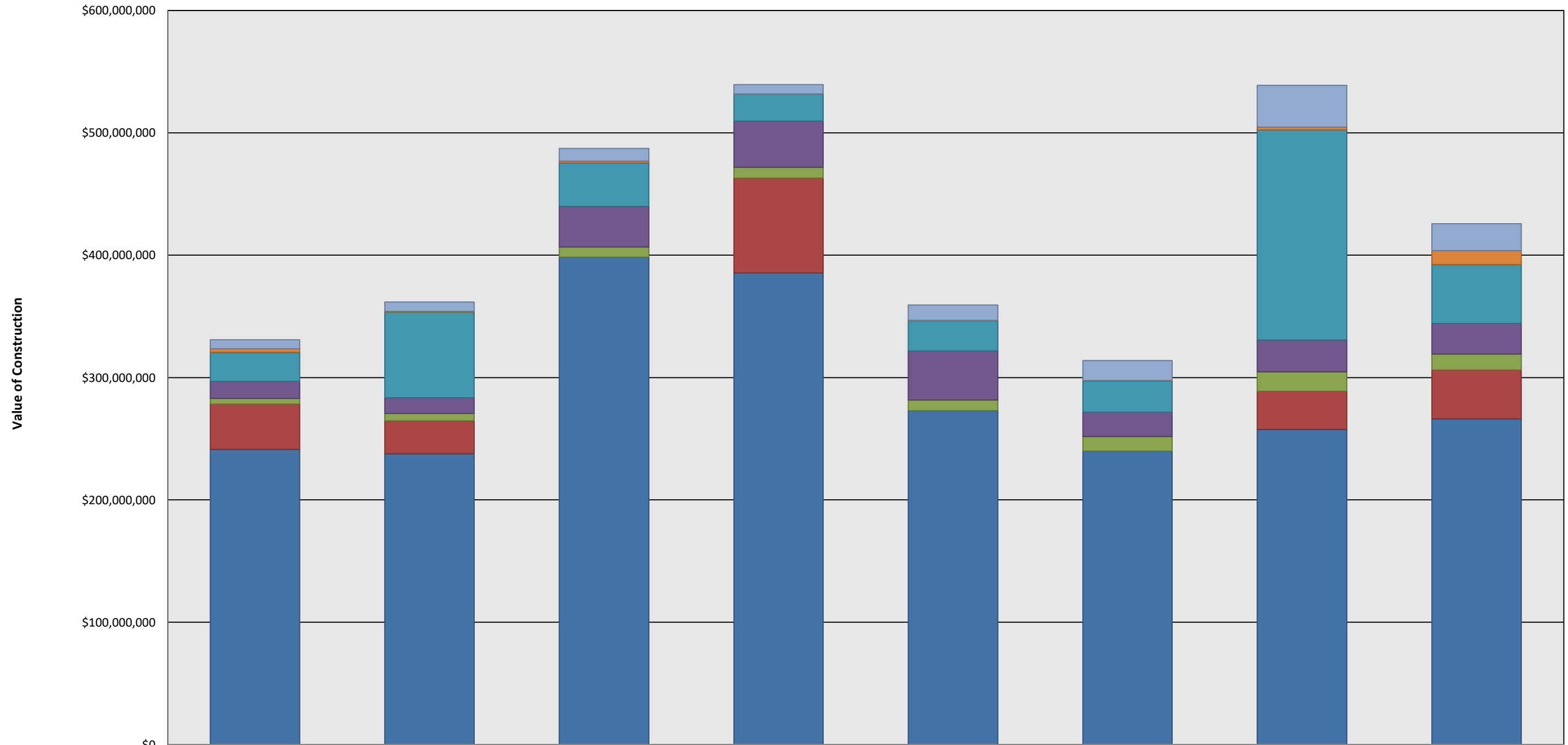


Month	July	August	September	October	November	December	January	February	March	April	May	June
FY 2026 (July 2025 - June 2026)	137	84	53	50	46	63	56	64	77	67	47	
FY 2025 (July 2024 - June 2025)	49	62	35	41	68	56	86	94	129	115	87	79
FY 2024 (July 2023 - June 2024)	81	63	44	76	37	62	97	59	65	111	59	43
FY 2023 (July 2022 - June 2023)	78	92	72	78	59	41	67	50	66	70	82	76
FY 2022 (July 2021 - June 2022)	106	116	151	130	71	80	105	73	74	81	69	89
FY 2021 (July 2020 - June 2021)	123	102	102	133	52	120	87	95	173	132	87	141
FY 2020 (July 2019 - June 2020)	96	79	65	82	39	91	65	74	63	65	82	124
FY 2019 (July 2018 - June 2019)	64	72	55	75	69	54	70	59	112	100	65	88

Notes: 1. Building Permits Issued excludes those Building Permits which were voided or withdrawn.

**Town of Bluffton  
Value of Construction  
FY 2019 - 2026**

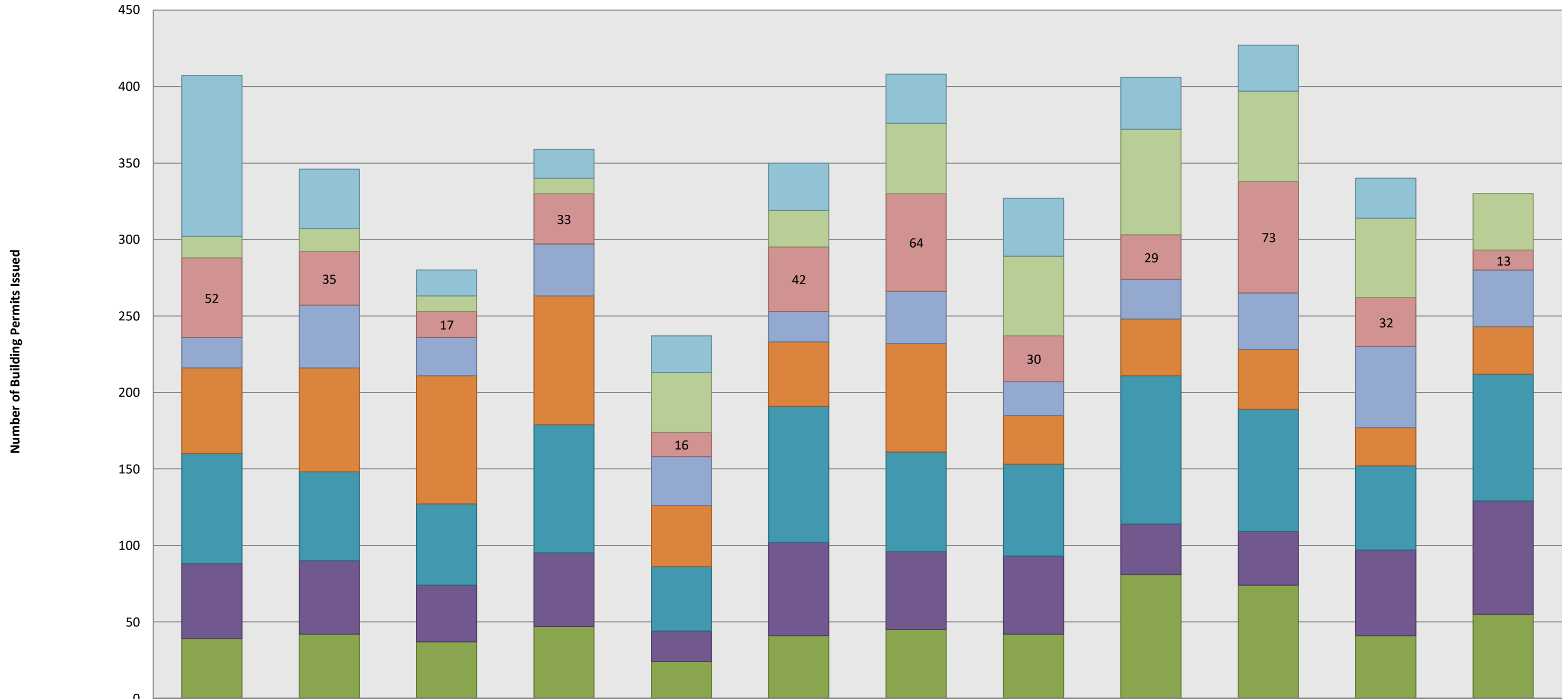
**Attachment 8c**



Year	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)	FY 2025 (July 2024- June 2025)	FY 2026 (July 2025- June 2026)
Other Commercial	\$7,263,366	\$7,579,860	\$10,412,995	\$7,596,115	\$12,475,855	\$16,317,280	\$34,086,632	\$22,267,797
Commercial Additions	\$3,041,168	\$656,000	\$1,492,691	\$7,550	\$526,290	\$413,300	\$2,244,852	\$11,308,165
New Commercial/ Tenant Upfits	\$23,614,625	\$69,976,821	\$35,480,001	\$22,266,766	\$24,611,903	\$25,409,903	\$171,813,272	\$48,192,591
Other Residential	\$13,979,443	\$12,794,241	\$33,207,203	\$37,696,800	\$40,039,634	\$19,926,881	\$26,021,991	\$24,911,630
Residential Additions/ Renovations	\$4,691,023	\$6,005,043	\$8,363,040	\$8,762,565	\$8,683,202	\$11,994,064	\$15,775,432	\$12,855,087
New Multi Family - Apartments	\$36,975,720	\$27,045,609	\$-	\$77,664,502	\$-	\$-	\$31,218,075	\$40,133,367
New Single Family	\$241,300,026	\$237,647,960	\$398,345,907	\$385,446,946	\$272,946,813	\$239,843,210	\$257,635,844	\$266,198,172

Notes: 1. Residential addition includes: additions, screen enclosures, carport, re-roof, modular.  
 2. Other residential includes: new accessory structure, new accessory residence.  
 3. Commercial addition includes: additions, screen enclosure, shell.  
 4. Other commercial includes: remodel and accessory structure.

### New Single Family Residential Building Permits Issued Per Month FY 2019 - 2026

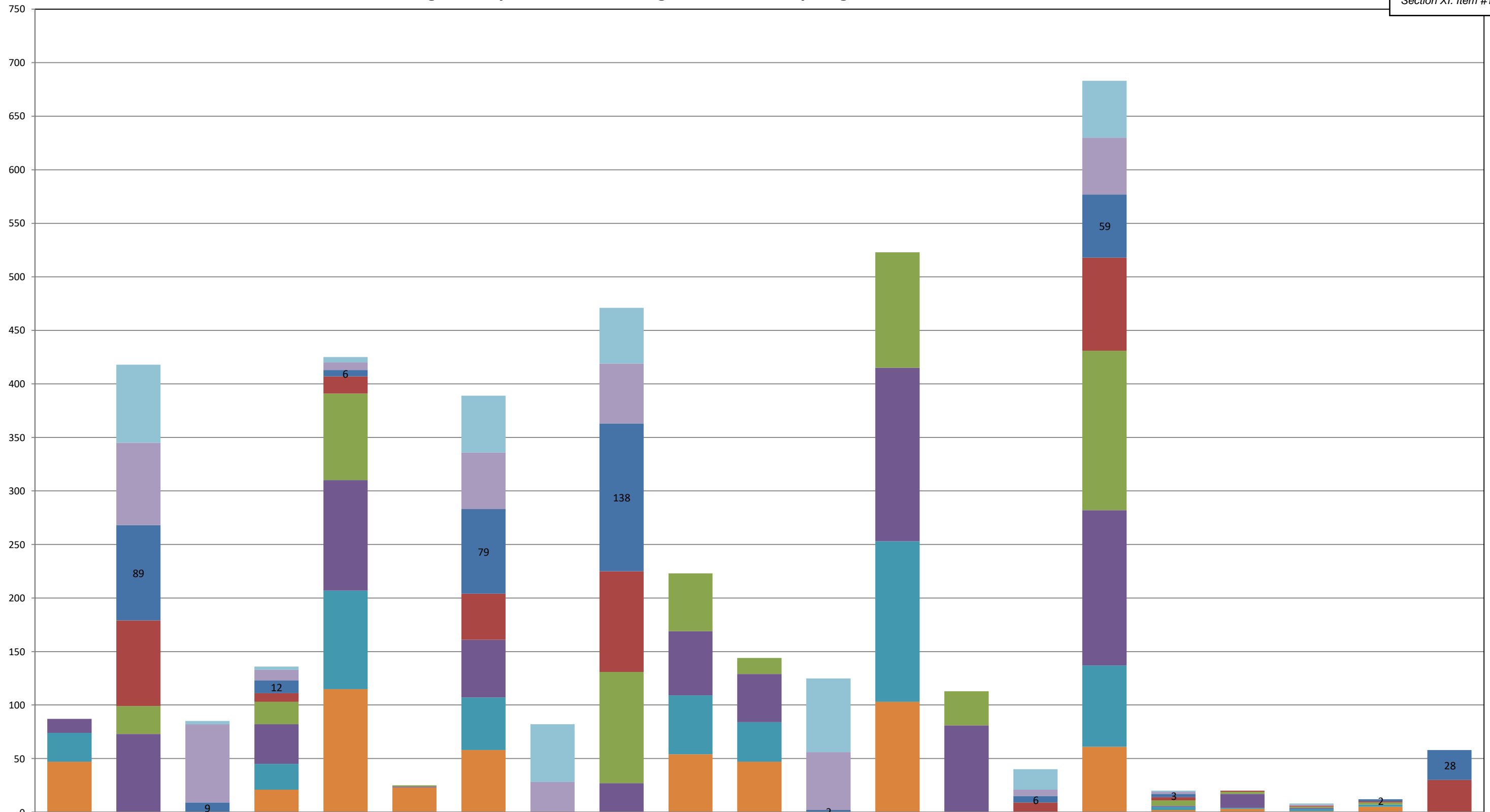


	July	August	September	October	November	December	January	February	March	April	May	June
FY 2026 (July 2025- June 2026)	105	39	17	19	24	31	32	38	34	30	26	
FY 2025 (July 2024- June 2025)	14	15	10	10	39	24	46	52	69	59	52	37
FY 2024 (July 2023 - June 2024)	52	35	17	33	16	42	64	30	29	73	32	13
FY 2023 (July 2022 - June 2023)	20	41	25	34	32	20	34	22	26	37	53	37
FY 2022 (July 2021 - June 2022)	56	68	84	84	40	42	71	32	37	39	25	31
FY 2021 (July 2020 - June 2021)	72	58	53	84	42	89	65	60	97	80	55	83
FY 2020 (July 2019 - June 2020)	49	48	37	48	20	61	51	51	33	35	56	74
FY 2019 (July 2018 - June 2019)	39	42	37	47	24	41	45	42	81	74	41	55

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 2019 -2026

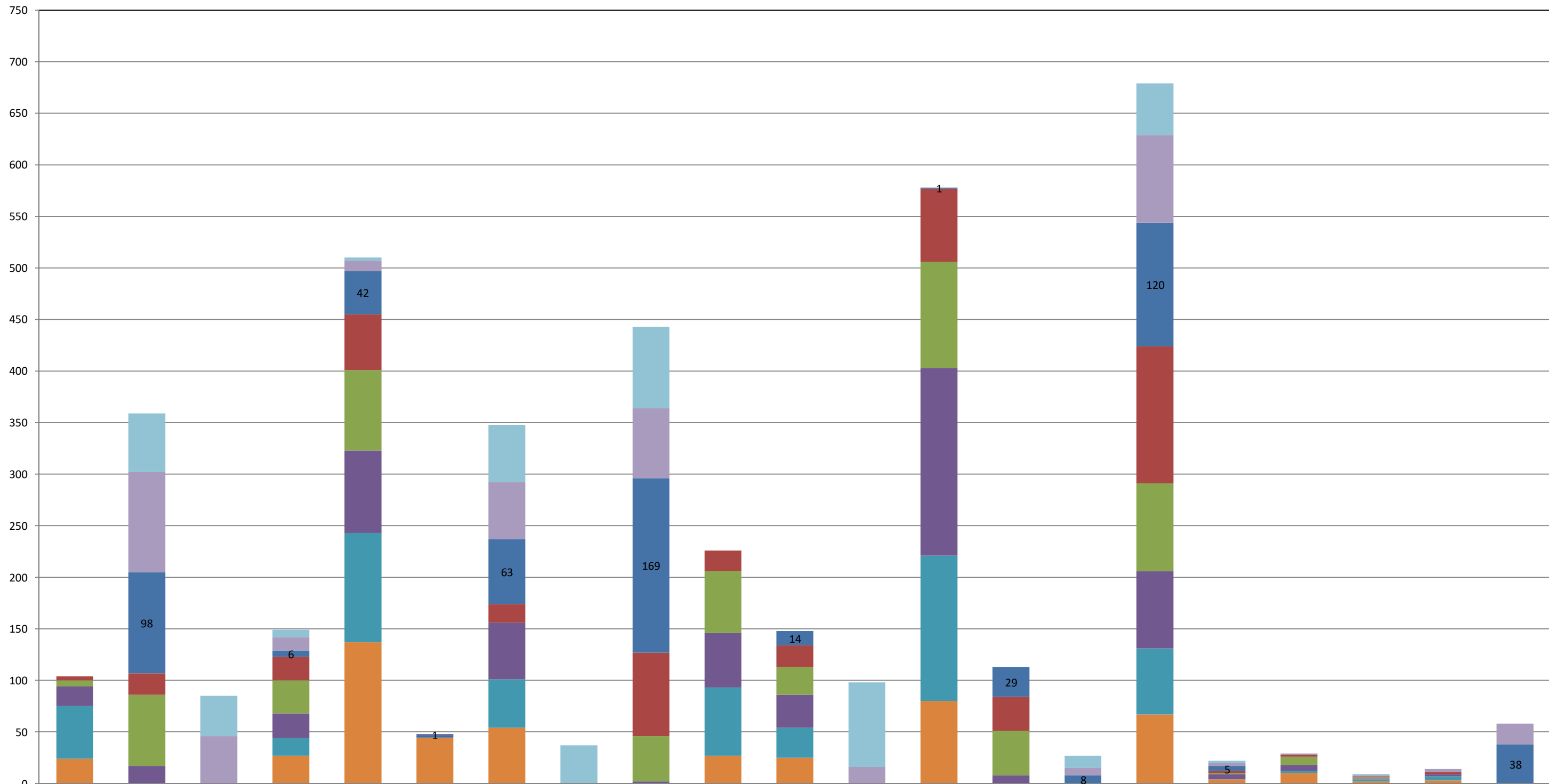
Number of Building Permits Issued



Neighborhood	Alston Park	Four Seasons at Carolina Oaks	Hamilton Grove	Hampton Hall	Hampton Lake	Haven at New Riverside	Heritage at New Riverside	Indigo Cove	Lakes at New Riverside	Landings at New Riverside	Lawton Station	Midpoint	Mill Creek at Cypress Ridge	New Riverside Forest	New Riverside Village	Palmetto Bluff	Rose Dhu Creek Plantation	Shell Hall	Stock Farm	Tabby Roads	Washington Square
FY 2026 (July 2025 - June 2026)		73	3	3	5		53	54	52			69			19	53	1		1		
FY 2025 (July 2024 - June 2025)		77	73	10	7		53	28	56			54			6	53	2		1		
FY 2024 (July 2023 - June 2024)		89	9	12	6		79		138			2			6	59	3			2	28
FY 2023 (July 2022 - June 2023)		80		8	16		43		94						9	87	3	1	1	1	30
FY 2022 (July 2021 - June 2022)		26		21	81	1			104	54	15		108	32		149	5	2	1	2	
FY 2021 (July 2020 - June 2021)	13	73		37	103	1	54		27	60	45		162	81		145	1	13	1		
FY 2020 (July 2019 - June 2020)	27			24	92		49			55	37		150			76	3	1	2	2	
FY 2019 (July 2018 - June 2019)	47			21	115	23	58			54	47		103			61	2	3	1	5	

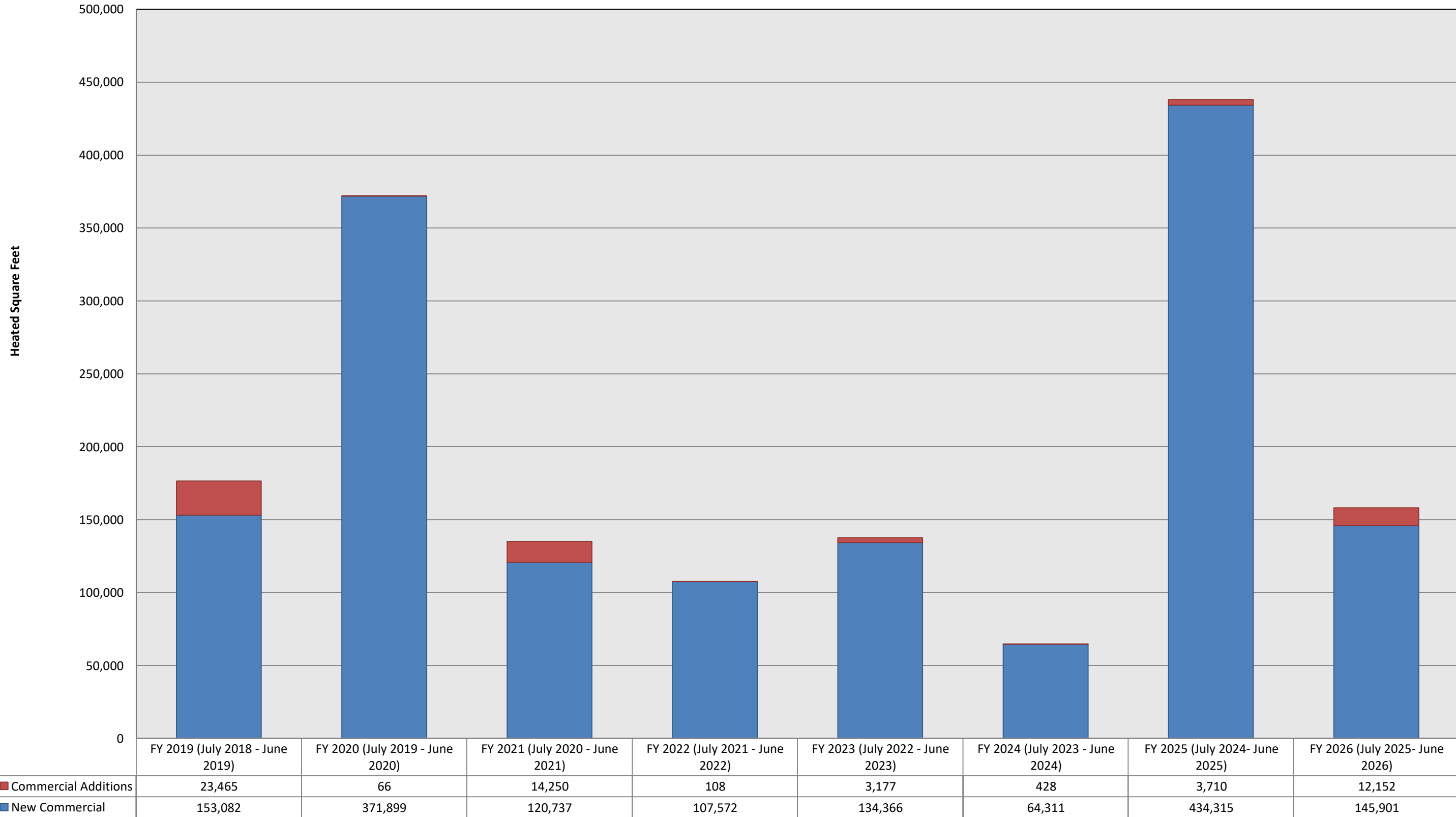
# Town of Bluffton New Single Family Certificates of Occupancy Issued by Neighborhood FY 2019 - 2026

Number of New Housing Starts



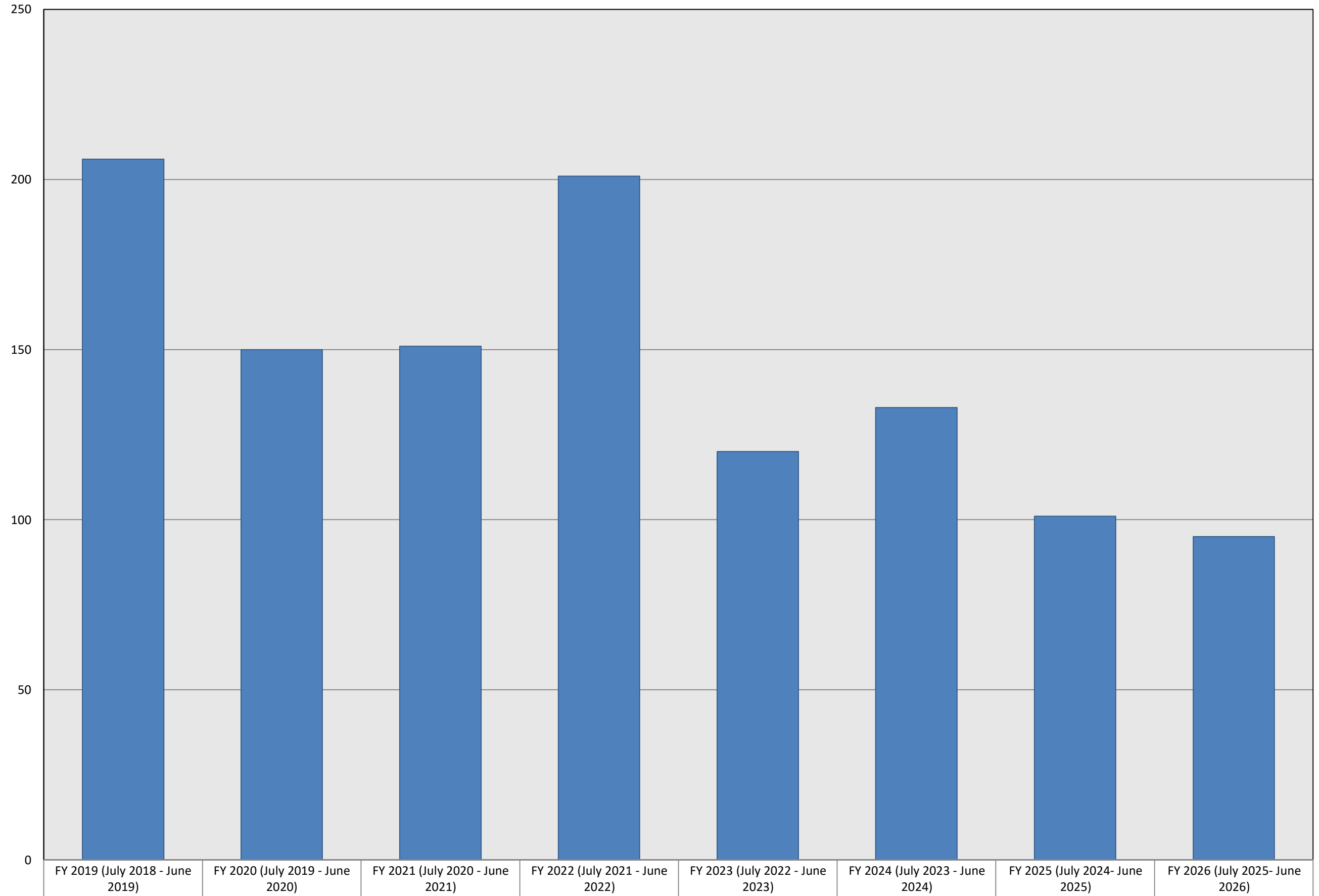
	Alston Park	Four Seasons at Carolina Oak	Hamilton Grove	Hampton Hall	Hampton Lake	Haven at New Riverside	Heritage at New Riverside	Indigo Cove	Lakes at New Riverside	Landings at New Riverside	Lawton Station	Midpoint	Mill Creek at Cypress Ridge	New Riverside Forest	New Riverside Village	Palmetto Bluff	Rose Dhu Creek Plantation	Shell Hall	Stock Farm	Tabby Roads	Washington Square
FY 2026 (July 2025 - June 2026)		57	39	7	3		56	37	79			82			12	50	2		1		
FY 2025 (July 2024 - June 2025)		97	46	13	10		55		68			16			7	85	3	1	1	3	20
FY 2024 (July 2023 - June 2024)		98		6	42	1	63		169		14		1	29	8	120	5				38
FY 2023 (July 2022 - June 2023)	4	21		23	54		18		81	20	21		71	33		133	2	2	1	2	
FY 2022 (July 2021 - June 2022)	6	69		32	78				44	60	27		103	43		85	1	8	1		
FY 2021 (July 2020 - June 2021)	19	17		24	80	2	55		2	53	32		182	8		75	5	6	1	2	
FY 2020 (July 2019 - June 2020)	51			17	106	1	47			66	29		141			64		2	2	4	
FY 2019 (July 2018 - June 2019)	24			27	137	44	54			27	25		80			67	4	10	2	3	

**Town of Bluffton**  
**New Commercial Construction and Additions Heated Square Footage**  
**FY 2019 - 2026**



**Town of Bluffton**  
**Planning & Community Development Applications Completed**  
**FY 2018 - 2025**

Number of Applications Completed

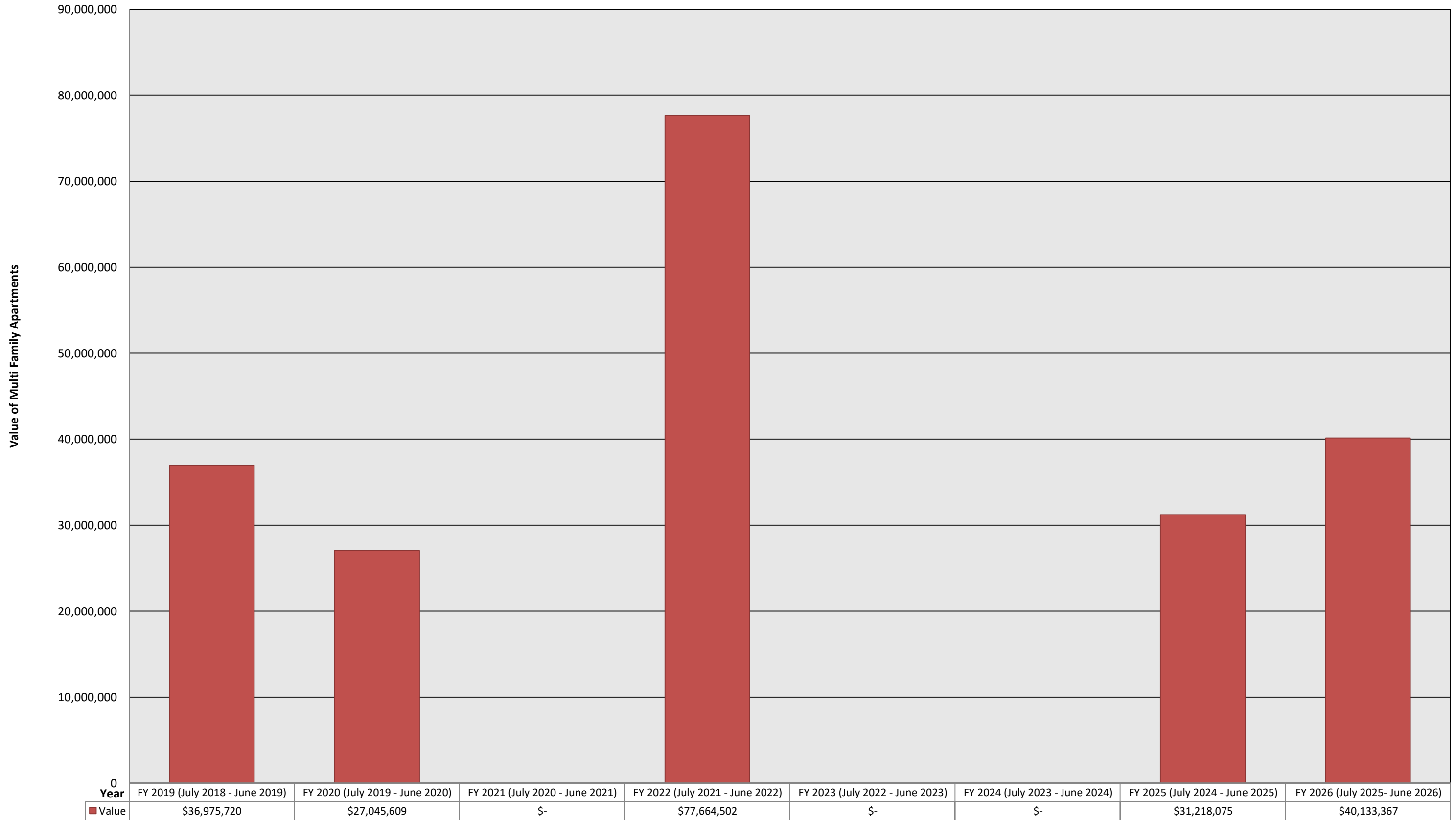


■ Planning & Community Development Applications

**Town of Bluffton**  
**Multi Family Apartments Value**  
**FY 2018 - 2025**

**Attachment 8i**

Section XI. Item #1.

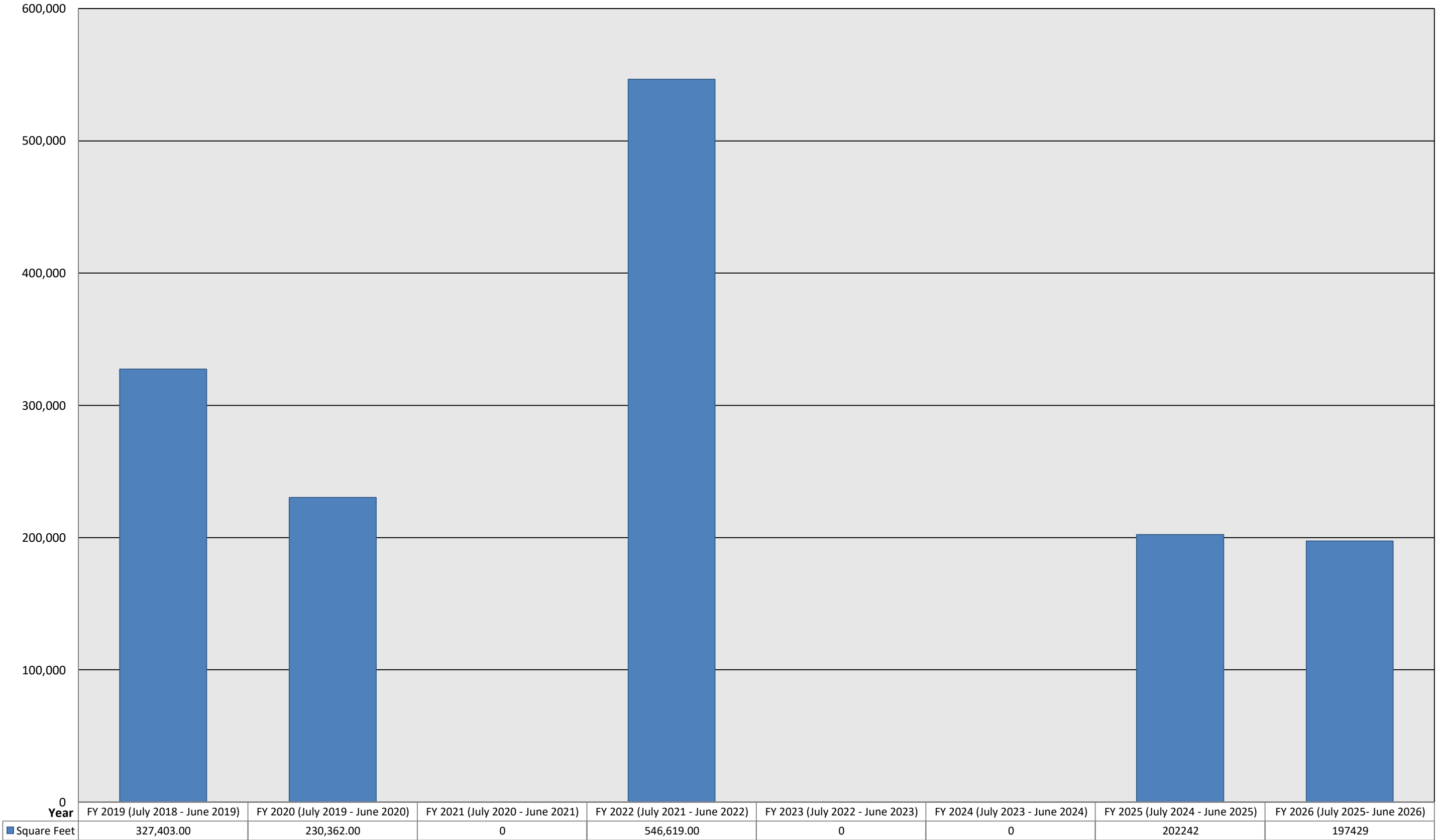


**Town of Bluffton**  
**Multi Family Apartments Square Footage**  
**FY 2018 - 2025**

**Attachment 8j**

Section XI. Item #1.

Square Footage of Multi Family Apartments

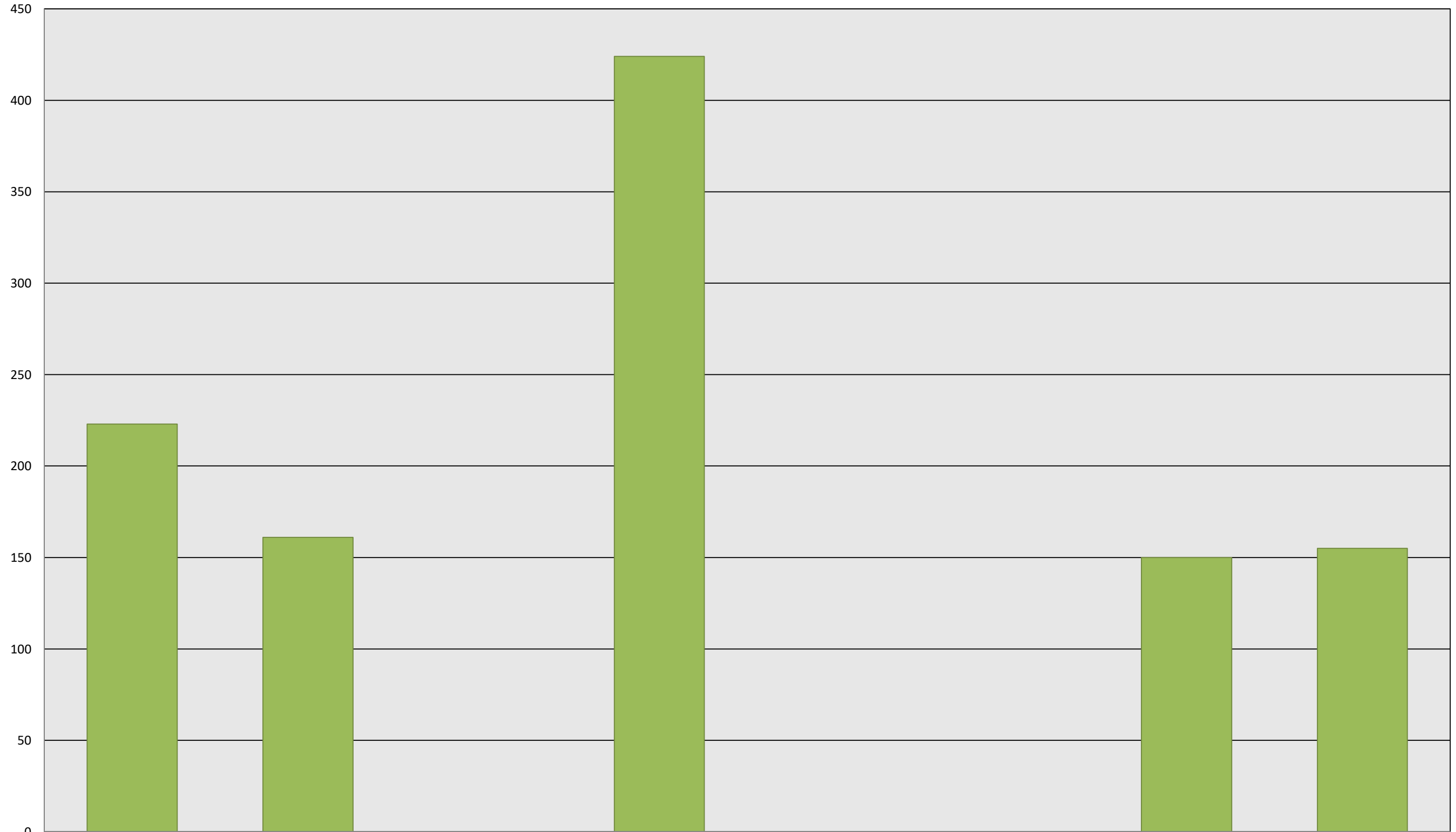


**Town of Bluffton**  
**Multi Family Apartments Total Units**  
**FY 2018 - 2025**

**Attachment 8k**

Section XI. Item #1.

Multi Family Apartments Total Units



Year	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)	FY 2025 (July 2024 - June 2025)	FY 2026 (July 2025- June 2026)
Dwelling Units	223	161	0	424	0	0	150	155



**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 1, 2026

---

### **Town Operations / Community Meetings**

- We held two Budget Workshops on May 21<sup>st</sup> and May 28<sup>th</sup>. The first Workshop focused on all funds (except Capital) and had a presentation from LRTA on their FY 25-26 and FY 26-27 funding requests. The second Workshop covered Capital Projects and a few carryover items from First Reading and the initial Workshop.
- We started our Parks and Recreation Master Planning process with community input. The consultants were here to hear from Councilmembers, staff, regional partners, and residents.
- Instead of a Historic Preservation Symposium, we did a series of Historic Walking Tours that were well attended.
- Town held our Annual Townwide Hurricane Preparedness Meeting and training. June 1<sup>st</sup> kicks off the official start to Hurricane Season, and we continue to ensure we are prepared.

### **Town Council/Town Attorney Related Meetings**

- Weekly Mayor / Mayor Pro Tempore / Manager meetings.
- Mayor, Council, and staff attended the SOLOCO meeting held in Bluffton on May 26<sup>th</sup>. We heard updates on the Beaufort County Transportation Penny, the Regional Planning Committee, and on the Tri-Share Pilot Program potential.
- Mayor, Council, and staff attended several ribbon-cutting and celebrations throughout the month.
- Attended the Quarterly Mayor/Manager meeting that was hosted by Port Royal.
- Town attorney, staff, and I attended the Beaufort County Council Meeting on May 11<sup>th</sup> for the discussion and final vote on our Green Penny application for the Foothill tracts. County Council approved and we finalized the grant approval.
- The Mayor presented the Mayor Service Awards to over 100 high school students on May 20<sup>th</sup>. Each recipient completed a minimum of 50 hours of community service with the highest completing over 640 hours of community service.
- Mayor, Police Chief, and I held our bi-monthly check-in meeting.

### **Updates and Miscellaneous Information**

- Town held our Movie Night on May 15<sup>th</sup> at New Riverside Barn Park. We also have a School's Out Celebration at the Welcome Center on June 1<sup>st</sup> and Waterslide Event on June 6<sup>th</sup> at Field of Dreams.
  - We celebrated Public Service Week May 4-8 for all the Town and celebrated Public Works Appreciation Week May 18-22.
  - Offices were closed on Monday, May 25<sup>th</sup> in observance of Memorial Day.
-

**TOWN COUNCIL**



**STAFF REPORT**  
**Public Services Department**

<b>MEETING DATE:</b>	June 09, 2026
<b>PROJECT:</b>	Consideration of Emergency Procurement of HVAC System for the Law Enforcement Center
<b>PROJECT MANAGER:</b>	Larry Beckler, Director of Public Resources

**RECOMMENDATION:**

Town Council consideration of the Emergency Procurement of a new HVAC System for the Law Enforcement Center.

**BACKGROUND/DISCUSSION:**

Town staff requests authorization from Town Council to proceed with the immediate emergency procurement and replacement of the HVAC system at the Town’s Law Enforcement Center (LEC). The existing system has experienced critical failures, including a total controls system failure and a failed compressor on one of the primary units. Replacement parts and circuit boards are no longer available, and temporary measures currently in place provide only limited operational control and reliability.

The condition of the system has exceeded in-house maintenance capabilities and has required multiple emergency service calls within the past week. There is little confidence the system can remain operational for an extended period of time, creating a significant risk of total HVAC failure at the LEC facility.

Updated pricing to replace all three HVAC units and install a new building-wide control system is \$374,459.00. Equipment lead times range from approximately three to fifteen weeks, with the controls system and one replacement unit expected to arrive first and be installed immediately upon delivery.

Staff have identified available funds within the current budget to initiate the project, with the remaining balance proposed for inclusion in the upcoming fiscal year budget.

**NEXT STEPS:**

Upon approval, Public Services will coordinate with Mock Mechanical for the installation of the new HVAC system.

**ATTACHMENTS:**

1. Procurement Memorandum for Emergency HVAC System at the LEC
2. Law Enforcement Center DDC Controls Upgrade Proposal
3. Law Enforcement Center Fitness Room HVAC Replacement Proposal
4. Aaon Make Up Air Unit Replacement Options Proposal
5. Law Enforcement Center RTU-1 Main Unit HVAC Replacement Proposal



# Procurement Memorandum

TO: Felicia Roth, Director of Compliance and Contracts

FROM: Larry Beckler, Director of Public Services

DATE: 5/20/2026

SUBJECT: emergency procurement - HVAC at LEC

## EXCEPTIONS TO STANDARD PROCUREMENT OVER \$15,000 BUT LESS THAN \$100,000

I did not, in good faith, obtain at least three competitive quotes because the following exception applies:

- This is on the following State contract or other Government agency contract. *Select an option from below and include the relevant contract number*
  - SC State Contract
  - Other Government Agency Contract (name): \_\_\_\_\_  
Contract number: \_\_\_\_\_
- This is on a cooperative purchasing contract.
  - Cooperative Purchasing Contract Name: \_\_\_\_\_
  - Cooperative Purchasing Contract Number: \_\_\_\_\_
  - Link to contract on coop's website: \_\_\_\_\_
- Added value purchase. Another vendor can meet or beat the SC State contract price.
  - SC State Contract Number: \_\_\_\_\_
  - Attach a copy of the SC State Contract provision; some require a price discount of a certain percentage below the State Contract pricing if utilizing a different vendor.*

Additional advantages over State contract provisions:

revised 7.24.2025

Standardization. This order is compatible with the following existing equipment or system:

\_\_\_\_\_

Software Renewal. This renewal is a continuation of existing software already implemented and in place.

Name of Software: \_\_\_\_\_

Purpose of Software: \_\_\_\_\_

How was it originally procured (formal bid, three quotes, etc.)?

\_\_\_\_\_

Is this software available to be purchased/renewed through multiple vendors?

Yes  No

Emergency purchase. An unforeseen situation or urgency exists, and this purchase is necessary to address a **threat to public health, welfare, safety or property.**

The details below describe the emergency and how the purchase will address it:

The control system of the HVAC at the Law Enforcement Center has been patched repeatedly and can no longer be serviced. There are no longer replacement circuit boards or parts to make repairs and the HVAC contractor has been in to patch work-arounds three times since 5/15. As a result, the entire HVAC system has to be replaced.

The HVAC contractor has provided quotes to replace the control system and the various units. It is important to note that some equipment has a 12-15 week lead time and all actions to preserve the health and safety of the employees at the LEC are being taken.

Not all local HVAC service providers are authorized installers of Carrier systems. To get multiple quotes would require reaching out to certified installers from Savannah or even Charleston. It is most expeditious to use the local installer from Savannah who routinely services our equipment.

Emergency procurement is permitted under Town of Bluffton Ordinance §2-274 and does require a report to Town Council.

revised 7.24.2025

Sole Source. There is only one company/vendor that can provide this good or service and an equal product or service is not available from any other source.

Check all entries below that apply to the proposed Sole Source purchase:

**THE PARTS/EQUIPMENT BEING PURCHASED...**

- are required from this source to permit standardization
- are not interchangeable with similar parts of another manufacturer

Current Town asset for which parts/equipment are being purchased and why this product is needed:

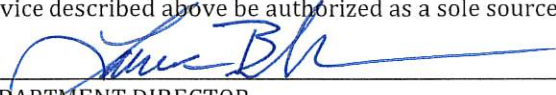
**THIS VENDOR IS THE ORIGINAL MANUFACTURER OR PROVIDER AND THERE ARE NO REGIONAL DISTRIBUTERS** *(attach the manufacturer's written certification that there are no regional distributors or providers for this product)*

**THIS VENDOR IS THE REGIONAL DISTRIBUTER OF THE ORIGINAL MANUFACTURER OR PROVIDER** *(attach the manufacturer's written certification that identifies the vendor as their authorized regional distributors for this product)*

**THIS IS A SINGLE SOURCED SERVICE THAT WILL MEET THE SPECIFIED NEEDS OF THIS DEPARTMENT OR PERFORM THE INTENDED FUNCTION**  
Describe the specialized function or application that justifies the uniqueness of the product separating them from other vendors of similar products:

NONE OF THE ABOVE SHALL APPLY (justify request below)

The undersigned requests that competitive procurement be waived and that the vendor identified as the supplier of the good or service described above be authorized as a sole source for the good or service.

  
DEPARTMENT DIRECTOR

5/20/26  
DATE

  
DIRECTOR OF COMPLIANCE & CONTRACTS

5/20/2026  
DATE

n/a  
SOLE SOURCE VETTED AND VALIDATED

\_\_\_\_\_  
DATE

n/a  
SOLE SOURCE DENIED

\_\_\_\_\_  
DATE

Reason for Denial:

**CHECK ONE:**

- This vendor is new and a W9 is attached.
- This vendor is in MUNIS as Vendor # \_\_\_\_\_.

revised 7.24.2025

## PROPOSAL

TO: Town of Bluffton  
20 Bridge Street  
Bluffton, SC 29909

Date: 5/19/2026

Project: **Law Enforcement Center 101 Progressive Street – DDC HVAC Controls Upgrade**

Attention: Larry Beckler

Scope of Work:

SCOPE: This Quotation covers the installation of the System and the specific System items listed in Section 2 and includes the following:

### A. System description:

(a) Existing Rooftop Unit (RTU-1) replace the existing antiquated Trane controller with a new BACnet open controller to include:

- Supply, mixed and return air temperature sensor
- Fan status switch
- Reuse existing static pressure sensor for supply fan speed control
- Reuse existing outdoor air damper actuator
- Reuse existing variable frequency drive

(b) Existing VAV/PIU Terminals (VAV-1 through 15) replace the existing Trane VAV terminal unit controllers with new BACnet open controllers to include:

- Space temperature sensors with setpoint and display
- Supply air temperature sensors
- Heating control

(c) Access and control (i-Vu) provide and install a BACnet open web-based server and router to connect the new system controls for access, monitoring and control of the system

Notes pertaining to above scope of work:

1. ALL VFDs are provided by Others
2. All louvers and louver dampers are provided by others
3. All bipolar ionization devices are provided by others
4. Provide and install a new communication bus for all new controls to sit on the BACnet Open MS/TP communication network
5. At least Two Static IP addresses will be required by the owner for interconnection of the controllers and the server.

A Division of Mock Plumbing & Mechanical, Inc.

2. SYSTEM ITEMS: The items marked “Included” are included in the quoted Fee (see below). The other items are available at an Additional Cost

System Items	Included Items	Additional Cost Items
Controls Installation:	X	
Controls Programming	X	
Control Dampers		X
VRF Equipment, thermostats and controls		X
GPS Devices or installation		X
Pressure gauges or thermostats		X
Web-Browser Interface	X	
Equipment Color Graphics	X	
Floor Plan Graphics:	X	
Owner Training:	X	

2. EXCLUSIONS:

Unless specifically stated in the Scope or listed as an included System Item.

Mock Mechanical provides low voltage (30Volts RMS max at 100VA) wiring (Class II) ONLY for the system proposed. All electrical wiring over Class II 24VAC including but not limited to, circuit breakers, High voltage transformers, starters, Panel Boards etc. is excluded. All work will be done during normal business hours on normal business days. All control wiring to be plenum rated and secured to the structure except in mechanical rooms and areas where other conduit and piping are exposed.

**Net Price: \$63,762.00**

Pricing includes Shipping, Tax and all necessary materials and labor to complete the job.

- Includes the truck and tools to perform work.
- Start up and check out.
- Mock provides a one-year warranty for this project.
- All work to be done during normal working hours, lead time on parts is as available from vendor.

# MOCK MECHANICAL SERVICES

A Division of Mock Plumbing & Mechanical, Inc.

Thank you for considering Mock Mechanical Services for these services. If you have any questions, or if I can be of further service, please do not hesitate to contact me. This proposal is valid for 45 days and requires a purchase order.

Sincerely,

*Clinton Davis*

Clinton Davis  
Service Operations Manager  
Mock Mechanical Services  
912-667-0217  
clintond@mocksavannah.com

## Proposal Acceptance

Name \_\_\_\_\_

Sign \_\_\_\_\_

Date \_\_\_\_\_

PO \_\_\_\_\_

A Division of Mock Plumbing & Mechanical, Inc.

## TERMS AND CONDITIONS

By accepting this proposal, Purchaser agrees to be bound by the following terms and conditions:

1. **SCOPE OF WORK.** All scope of work is based upon the use of straight time labor only unless otherwise noted. Plastering, patching and painting are excluded. Purchaser agrees to provide **Mock Mechanical Services** with required field utilities (electricity, toilets, drinking water, project hoist, elevator service, etc.) without charge. **Mock Mechanical Services** agrees to keep the job site clean of debris arising out of its own operations. Purchaser shall not back charge company for any costs or expenses without company written consent.
2. **INVOICING & PAYMENTS.** **Mock Mechanical Services** may invoice Purchaser monthly for all materials delivered to the job site or to an off-site storage facility and for all work performed on-site and off-site. Fifteen percent (15%) of the contract price is for engineering, drafting and other mobilization costs incurred prior to installation. This 15% shall be included in **Mock Mechanical Services** initial invoice. Purchaser agrees to pay **Mock Mechanical Services** the amount invoiced upon receipt of the invoice. Waivers of lien will be furnished upon request, as the work progresses, to the extent payments are received.
3. **MATERIALS.** If the materials or equipment included in this proposal become temporarily or permanently unavailable for reasons beyond the control and without the fault of **Mock Mechanical Services** then in the case of such temporary unavailability, the time for performance of the work shall be extended to the extent thereof, and in the case of permanent unavailability, **Mock Mechanical Services** shall (a) be excused from furnishing said materials or equipment, and (b) be reimbursed for the difference between the cost of the materials or equipment permanently unavailable and the cost of a reasonably available substitute therefor.
4. **WARRANTY.** **Mock Mechanical Services** warrants that the equipment supplied by manufacture shall be free from defects in material and workmanship arising from normal usage for a period of one (1) year from startup date of said equipment. These warranties do not extend to any equipment which has been repaired by others, abused, altered or misused, or which has not been properly and reasonably maintained. All labor warranty on service repairs are ninety days (90) unless otherwise stated. THESE WARRANTIES ARE IN LIEU OF ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THOSE OF MERCHANTABILITY AND FITNESS FOR A SPECIFIC PURPOSE.
5. **LIABILITY.** **Mock Mechanical Services** shall not be liable for any special, indirect or consequential damages arising in any manner from the equipment or material furnished or the work performed pursuant to this agreement.
6. **TAXES.** The price of this proposal does not include duties, sales, use, excise, or other similar taxes, unless required by federal, state or local law. Purchaser shall pay, in addition to the stated price, all taxes not legally required to be paid by **Mock Mechanical Services** or, alternatively, shall provide **Mock Mechanical Services** with acceptable tax exemption certificates.
7. **DELAYS.** **Mock Mechanical Services** shall not be liable for any delay in the performance of the work resulting from or attributed to acts or circumstances beyond **Mock Mechanical Services** normal control, including, but not limited to, acts of God, fire, riots, labor disputes, conditions of the premises, acts or omissions of the Purchaser, Owner or other Contractors or delays caused by suppliers or subcontractors of **Mock Mechanical Services**, etc.
8. **COMPLIANCE WITH LAWS.** **Mock Mechanical Services** shall comply with all applicable federal, state and local laws and regulations and shall obtain all temporary licenses and permits required for the prosecution of the work. Licenses and permits of a permanent nature shall be procured and paid for by the Purchaser.
9. **INSURANCE.** Standard Limits of Insurance coverage shall be furnished when requested and required.
10. **INDEMNITY.** The Parties hereto agree to indemnify each other from any and all liabilities, claims, expenses, losses or damages, including attorneys' fees, which may arise in connection with the execution of the work herein specified and which are caused, in whole or in part, by the negligent act or omission of the Indemnifying Party.
11. **OCCUPATIONAL SAFETY AND HEALTH.** The Parties hereto agree to notify each other immediately upon becoming aware of an inspection under, or any alleged violation of, the Occupational Safety and Health Act relating in any way to the project or project site.
12. **ENTIRE AGREEMENT.** This proposal, upon acceptance, shall constitute the entire agreement between the parties and supersedes any prior representations or understandings.

A Division of Mock Plumbing & Mechanical, Inc.

## PROPOSAL

TO: Town of Bluffton  
20 Bridge Street  
Bluffton, SC 29909

Date: 5/19/2026

Project: **Law Enforcement Center 101 Progressive Street – Fitness Room HVAC Replacement**

Existing Trane Model: THC072ERGA06B0C1A2A2000 Serial: 103312298L (6-ton)

We recommend installing a 5-ton unit for replacement since the cooling load has been reduced in this space with the absence of laboratory equipment and the addition of the cooling units in the evidence room.

Attention: Larry Beckler

Scope of Work:

1. Disconnect all electrical and control wiring and use a crane to remove the unit from the rooftop.
2. Supply and install a new 5-ton packaged cooling unit with electric heat Carrier model 50FE-M06A2M5.
3. Supply a curb adapter to sit the new unit on the existing curb and connect to the existing ducts and roof openings.
4. Modify and reconnect to the existing electrical. Reconnect to the existing controls and install a new drain.
5. Start the system to confirm that it's operating correctly.

**Net Price: \$24,230.00**

Pricing includes shipping, tax, Tax and all necessary materials and labor to complete the job.

- Includes the truck and tools to perform work.
- Start up and check out.
- Mock provides a 90-day labor warranty.
- All work to be done during normal working hours, lead time on parts is as available from the vendor.

Thank you for considering Mock Mechanical Services for these services. If you have any questions or if I can be of further service, please do not hesitate to contact me. This proposal is valid for 45 days and requires a purchase order.

Sincerely,

*Clinton Davis*

Clinton Davis  
Service Operations Manager  
Mock Mechanical Services

# MOCK MECHANICAL SERVICES

A Division of Mock Plumbing & Mechanical, Inc.

---

912-667-0217 clintond@mocksavannah.com

## Proposal Acceptance

Name \_\_\_\_\_

Sign \_\_\_\_\_

Date \_\_\_\_\_

PO \_\_\_\_\_

A Division of Mock Plumbing & Mechanical, Inc.

## TERMS AND CONDITIONS

By accepting this proposal, Purchaser agrees to be bound by the following terms and conditions:

1. **SCOPE OF WORK.** All scope of work is based upon the use of straight time labor only unless otherwise noted. Plastering, patching and painting are excluded. Purchaser agrees to provide **Mock Mechanical Services** with required field utilities (electricity, toilets, drinking water, project hoist, elevator service, etc.) without charge. **Mock Mechanical Services** agrees to keep the job site clean of debris arising out of its own operations. Purchaser shall not back charge company for any costs or expenses without company written consent.
2. **INVOICING & PAYMENTS.** **Mock Mechanical Services** may invoice Purchaser monthly for all materials delivered to the job site or to an off-site storage facility and for all work performed on-site and off-site. Fifteen percent (15%) of the contract price is for engineering, drafting and other mobilization costs incurred prior to installation. This 15% shall be included in **Mock Mechanical Services** initial invoice. Purchaser agrees to pay **Mock Mechanical Services** the amount invoiced upon receipt of the invoice. Waivers of lien will be furnished upon request, as the work progresses, to the extent payments are received.
3. **MATERIALS.** If the materials or equipment included in this proposal become temporarily or permanently unavailable for reasons beyond the control and without the fault of **Mock Mechanical Services** then in the case of such temporary unavailability, the time for performance of the work shall be extended to the extent thereof, and in the case of permanent unavailability, **Mock Mechanical Services** shall (a) be excused from furnishing said materials or equipment, and (b) be reimbursed for the difference between the cost of the materials or equipment permanently unavailable and the cost of a reasonably available substitute therefor.
4. **WARRANTY.** **Mock Mechanical Services** warrants that the equipment supplied by manufacture shall be free from defects in material and workmanship arising from normal usage for a period of one (1) year from startup date of said equipment. These warranties do not extend to any equipment which has been repaired by others, abused, altered or misused, or which has not been properly and reasonably maintained. All labor warranty on service repairs are ninety days (90) unless otherwise stated. THESE WARRANTIES ARE IN LIEU OF ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THOSE OF MERCHANTABILITY AND FITNESS FOR A SPECIFIC PURPOSE.
5. **LIABILITY.** **Mock Mechanical Services** shall not be liable for any special, indirect or consequential damages arising in any manner from the equipment or material furnished or the work performed pursuant to this agreement.
6. **TAXES.** The price of this proposal does not include duties, sales, use, excise, or other similar taxes, unless required by federal, state or local law. Purchaser shall pay, in addition to the stated price, all taxes not legally required to be paid by **Mock Mechanical Services** or, alternatively, shall provide **Mock Mechanical Services** with acceptable tax exemption certificates.
7. **DELAYS.** **Mock Mechanical Services** shall not be liable for any delay in the performance of the work resulting from or attributed to acts or circumstances beyond **Mock Mechanical Services** normal control, including, but not limited to, acts of God, fire, riots, labor disputes, conditions of the premises, acts or omissions of the Purchaser, Owner or other Contractors or delays caused by suppliers or subcontractors of **Mock Mechanical Services**, etc.
8. **COMPLIANCE WITH LAWS.** **Mock Mechanical Services** shall comply with all applicable federal, state and local laws and regulations and shall obtain all temporary licenses and permits required for the prosecution of the work. Licenses and permits of a permanent nature shall be procured and paid for by the Purchaser.
9. **INSURANCE.** Standard Limits of Insurance coverage shall be furnished when requested and required.
10. **INDEMNITY.** The Parties hereto agree to indemnify each other from any and all liabilities, claims, expenses, losses or damages, including attorneys' fees, which may arise in connection with the execution of the work herein specified and which are caused, in whole or in part, by the negligent act or omission of the Indemnifying Party.
11. **OCCUPATIONAL SAFETY AND HEALTH.** The Parties hereto agree to notify each other immediately upon becoming aware of an inspection under, or any alleged violation of, the Occupational Safety and Health Act relating in any way to the project or project site.
12. **ENTIRE AGREEMENT.** This proposal, upon acceptance, shall constitute the entire agreement between the parties and supersedes any prior representations or understandings.

A Division of Mock Plumbing & Mechanical, Inc.

## PROPOSAL

Updated: 05/18/2026

TO: Town of Bluffton  
20 Bridge Street  
Bluffton, SC 29910

Project: **Aaon Make Up Air Unit Replacement Options**  
101 Progressive Street

Attention: Brian

We propose to provide the described services below for the net price of: (See Below).

Model #RN-015-8-A-EB19  
Serial #201009-ANEL03790

- Lock Out / Tag Out Unit.
- Supply labor, crane, materials, and tools to remove and dispose of unit as per EPA Regulations.
- Supply labor, tools, crane and materials to install new Optional Brand unit that matches the existing unit specification. (See Below)
- The new unit will come with coated coils.
- Modify and reconnect to existing electrical.
- Install new drain line.
- Modify and reconnect to existing controls.
- 5-Year Compressor Manufacturer warranty, 1-year parts and labor warranty.
- Start up.
- **All work to be done during normal working hours.**
- **We will furnish a set of submittals upon receipt of a purchase order.**

Option #1 New Aaon Brand Unit (Equipment Current Lead Time is 12 weeks)

**Installed Price: \$151,829.00**

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Option #2 New Greenheck Brand Unit (Equipment Current Lead Time is 12 weeks)

**Installed Price: \$147,912.00**

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Option #3 New Thermotek Brand Unit (Equipment Current Lead Time is 16 weeks)

**Installed Price: \$149,938.00**

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A Division of Mock Plumbing & Mechanical, Inc.

### Understanding and Clarification.

- All work shall be done during normal working hours.
- There will be a price increase after June 30th, 2026, coming from all vendors.

Thank you for considering Mock Mechanical Services for these services. If you have any questions, or if I can be of further service, please do not hesitate to contact me. This proposal is valid for 30 days and requires a purchase order.

Sincerely,

*Ricky Holland*

Ricky Holland  
Sales, Service Manager  
Mock Mechanical Services  
912-438-2007  
[rickyh@mocksavannah.com](mailto:rickyh@mocksavannah.com)

Sign:.....

Date:.....

A Division of Mock Plumbing & Mechanical, Inc.

## TERMS AND CONDITIONS

By accepting this proposal, Purchaser agrees to be bound by the following terms and conditions:

1. **SCOPE OF WORK.** All scope of work are based upon the use of straight time labor only unless otherwise noted. Plastering, patching and painting are excluded. Purchaser agrees to provide **Mock Mechanical Services** with required field utilities (electricity, toilets, drinking water, project hoist, elevator service, etc.) without charge. **Mock Mechanical Services** agrees to keep the job site clean of debris arising out of its own operations. Purchaser shall not back charge company for any costs or expenses without company written consent.
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3. **MATERIALS.** If the materials or equipment included in this proposal become temporarily or permanently unavailable for reasons beyond the control and without the fault of **Mock Mechanical Services** then in the case of such temporary unavailability, the time for performance of the work shall be extended to the extent thereof, and in the case of permanent unavailability, **Mock Mechanical Services** shall (a) be excused from furnishing said materials or equipment, and (b) be reimbursed for the difference between the cost of the materials or equipment permanently unavailable and the cost of a reasonably available substitute therefor.
4. **WARRANTY.** **Mock Mechanical Services** warrants that the equipment supplied by manufacture shall be free from defects in material and workmanship arising from normal usage for a period of one (1) year from startup date of said equipment. These warranties do not extend to any equipment which has been repaired by others, abused, altered or misused, or which has not been properly and reasonably maintained. All labor warranty on service repairs are ninety days (90) unless otherwise stated. THESE WARRANTIES ARE IN LIEU OF ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THOSE OF MERCHANTABILITY AND FITNESS FOR A SPECIFIC PURPOSE.
1. **LIABILITY.** **Mock Mechanical Services** shall not be liable for any special, indirect or consequential damages arising in any manner from the equipment or material furnished or the work performed pursuant to this agreement.
2. **TAXES.** The price of this proposal does not include duties, sales, use, excise, or other similar taxes, unless required by federal, state or local law. Purchaser shall pay, in addition to the stated price, all taxes not legally required to be paid by **Mock Mechanical Services** or, alternatively, shall provide **Mock Mechanical Services** with acceptable tax exemption certificates.
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5. **INSURANCE.** Standard Limits of Insurance coverage shall be furnished when requested and required.
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A Division of Mock Plumbing & Mechanical, Inc.

## PROPOSAL

TO: Town of Bluffton  
20 Bridge Street  
Bluffton, SC 29909

Date: 5/20/2026

Project: **Law Enforcement Center 101 Progressive Street – RTU-1 Main Unit HVAC Replacement**

Existing Trane Model: TED360BEAU0B2DA5ABC00F Serial: C19C01384 (30-ton)

Attention: Larry Beckler

Scope of Work:

1. Disconnect all electrical and control wiring and use a crane to remove the unit from the rooftop.
2. Supply and install a new 30-ton packaged cooling unit with electric heat Carrier model 50V2CQ30A0B5.
3. Supply a curb adapter to sit the new unit on the existing curb and connect to the existing ducts and roof openings.
4. Modify and reconnect to the existing electrical. Reconnect to the existing controls and install a new drain.
5. Start the system to confirm that it's operating correctly.

**Net Price: \$138,555.00**

**Equipment lead time is currently 15 weeks from order date.**

Pricing includes shipping, tax, and all necessary materials and labor to complete the job.

- Includes the truck and tools to perform work.
- Start up and check out.
- Mock provides a 90-day labor warranty.
- All work to be done during normal working hours, lead time on parts is as available from the vendor.

Thank you for considering Mock Mechanical Services for these services. If you have any questions or if I can be of further service, please do not hesitate to contact me. This proposal is valid for 45 days and requires a purchase order.

Sincerely,

*Clinton Davis*

Clinton Davis  
Service Operations Manager  
Mock Mechanical Services  
912-667-0217 clintond@mocksavannah.com

A Division of Mock Plumbing & Mechanical, Inc.

---

**Proposal Acceptance**

Name \_\_\_\_\_

Sign \_\_\_\_\_

Date \_\_\_\_\_

PO \_\_\_\_\_

A Division of Mock Plumbing & Mechanical, Inc.

## TERMS AND CONDITIONS

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9. **INSURANCE.** Standard Limits of Insurance coverage shall be furnished when requested and required.
10. **INDEMNITY.** The Parties hereto agree to indemnify each other from any and all liabilities, claims, expenses, losses or damages, including attorneys' fees, which may arise in connection with the execution of the work herein specified and which are caused, in whole or in part, by the negligent act or omission of the Indemnifying Party.
11. **OCCUPATIONAL SAFETY AND HEALTH.** The Parties hereto agree to notify each other immediately upon becoming aware of an inspection under, or any alleged violation of, the Occupational Safety and Health Act relating in any way to the project or project site.
12. **ENTIRE AGREEMENT.** This proposal, upon acceptance, shall constitute the entire agreement between the parties and supersedes any prior representations or understandings.

TOWN COUNCIL



STAFF REPORT  
Projects and Watershed Resilience Department

<b>MEETING DATE:</b>	June 9, 2026
<b>PROJECT:</b>	Consideration of a Resolution Authorizing Acceptance of Amended Easement Donation from Beaufort County School District Necessary to Complete Portions of the Pritchard Street Streetscape and Drainage Project
<b>PROJECT MANAGER:</b>	Kimberly Washok-Jones, Director of Projects and Watershed Resilience

**REQUEST:** Town Staff requests Town Council approve the Resolution (Attachment 1) authorizing the acceptance of amended easement donation from Beaufort County School District (BCSD) for the purpose of completing portions of the Pritchard Street Streetscape and Drainage Project.

**BACKGROUND:** With the approval of the Fiscal Year (FY) 2025-2026 Strategic Plan and Fiscal Year 2026 Consolidated Budget, Town staff continues with construction of Pritchard Street Streetscape and Drainage Improvements. During construction, concerns were raised with the required number of tree removals necessary to install a proposed sidewalk slightly north of the bus entrance road to MC Riley Early Learning Child Center. Based on internal Town discussions and with the BCSD, it was agreed that relocating the sidewalk 10-15’ to the east would minimize tree removal and offer a mutually agreed upon alternative alignment.

The proposed sidewalk realignment and revised easement was presented to BCSD’s Operations Committee on May 12, 2026, and approved. The Amended Easement package was presented to the BCSD Board on May 19, 2026, and approved. Revision and acquisition of the amended easement areas are necessary to complete sidewalk alignment as currently proposed.

**NEXT STEPS:**

1. Town Council approves the acceptance of the amended easement donations.
2. Town Manager executes easements.
3. Recording of easements.

**SUMMARY:** Town Staff requests Town Council accepts the amended donation of the easement from Beaufort County School District and authorizes the Town Manager and Town Staff to take such actions as are necessary to complete the acceptance of the easement donation(s).

**ATTACHMENTS:**

1. Resolution
  - a. Exhibit A – Amended Easement with Exhibit
2. Proposed Motion

**RESOLUTION**

**A RESOLUTION AUTHORIZING ACCEPTANCE OF AN AMENDED EASEMENT DONATION FROM BEAUFORT COUNTY SCHOOL DISTRICT NECESSARY TO COMPLETE THE PRITCHARD STREET STREETScape PROJECT**

WHEREAS, the Town of Bluffton is seeking to improve and enhance Pritchard Street, a town owned roadway located within the Town of Bluffton, which improvements and enhancements include, but are not limited to, drainage, sidewalk, lighting and right of way improvements (collectively, the “Project”); and,

WHEREAS, The Town and Beaufort County School District previously recorded a Streetscape Easement Agreement with the Beaufort County Register of Deeds which established a Streetscape Easement Area and a Temporary Easement Area (collectively “Easement Area”); and

WHEREAS, the parameters and location of Easement Area have changed and, to complete the Project, the Town needs to amend the previously recorded Streetscape Easement Agreement to accurately reflect the new and correct Easement Area; and,

WHEREAS, the property owner has expressed support for the Project and has voluntarily offered to execute an Amended Streetscape Easement and convey these easement interests to the Town as a donation to the Town for a public purpose; and,

WHEREAS, the Town desires to accept the donation of the easement and Town Council has determined that it is in the public interest for the Town to accept the donation and conveyance of the Easement; and,

WHEREAS, Town Council desires to authorize the Town Manager to execute such documents and to expend such funds as are necessary to complete the donation and conveyance of the Easement to the Town and, to the extent necessary, to ratify the Town Manager’s actions related to the same.

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

1. The Town Council hereby authorizes the acceptance of the donation and conveyance of the Easements to the Town as a donation to the Town for any valid public purpose and approves the Easements in a substantially similar form as attached hereto as Exhibit “A”.

2. The Mayor, Town Manager, and Town Clerk are each hereby authorized to execute any and all documents necessary to effect the donation and conveyance of the Easement as a donation to the Town, including, without limitation, the acceptance and recordation of the above-referenced Easement with the Office of the Register of Deeds for Beaufort County, South Carolina. The Town Manager is hereby authorized to pay such reasonable costs of the transaction as may be necessary.

**THIS RESOLUTION SHALL BE EFFECTIVE IMMEDIATELY UPON ADOPTION.  
SIGNED, SEALED AND DELIVERED AS OF THIS \_\_\_\_\_ DAY OF \_\_\_\_\_,  
2026.**

---

Larry C. Toomer, Mayor  
Town of Bluffton, South Carolina

ATTEST:

---

Marcia Hunter, Town Clerk  
Town of Bluffton, South Carolina

EXHIBIT "A"  
(EASEMENT FORM)

PREPARED BY AND WITHOUT BENEFIT OF TITLE EXAMINATION:  
FINGER, MELNICK & BROOKS, P.A.  
Post Office Box 24005  
Hilton Head Island, South Carolina 29925  
(843) 681-7000

STATE OF SOUTH CAROLINA ) AMENDED STREETScape EASEMENT  
) (PRITCHARD STREET-BLUFFTON)  
) TMS No. R610-039-000-0057-0000  
) TMS No. R610-039-000-056B-0000  
COUNTY OF BEAUFORT ) Dominion Energy Easement No. 906946  
) Easement No. 2025040568, Book 4463 Page 259

**THIS AMENDED STREETScape EASEMENT (“Amended Easement”)** is made and entered into on this \_\_\_ day of \_\_\_\_\_, 2026, (“**Effective Date**”) by and between BEAUFORT COUNTY SCHOOL DISTRICT AS SUCCESSOR IN INTEREST OF THE BLUFFTON SCHOOL, a body politic, (“**Grantor**”) and THE TOWN OF BLUFFTON, a South Carolina municipal corporation of 20 Bridge Street, Bluffton, South Carolina 29910 (“**Town**”), and DOMINION ENERGY OF SOUTH CAROLINA, INC., a South Carolina corporation (“**Dominion**”); hereinafter the Town and Dominion collectively referred to as the “**Grantee**”; and collectively hereinafter the Grantor and Grantee are referred to as the “**Parties**” and individually as a “**Party**”.

WITNESSETH:

**WHEREAS**, the Parties, recorded a Streetscape Easement Agreement with the Beaufort County Register of Deeds on September 8, 2025, in Book 4463 at Page 259 (“**Streetscape Easement**”), which established a “**Streetscape Easement Area**” and “**Temporary Easement Area**” specifically shown, described, and designated as provided in an attached Exhibit A; and

**WHEREAS**, an additional easement area, referred to as “**Drainage Easement Area**” is being added hereto and incorporated herein to this Amended Easement and the Parties agree for purposes of the original easement and this Amended Easement, the *Streetscape Easement Area*, *Drainage Easement Area* and *Temporary Easement Area* are collectively referred to as the “**Easement Areas**”; and the Grantor affirms, acknowledges and represents that the Easement Areas are located on the Property which is owned in fee simple by the Grantor; and

**WHEREAS**, the Parties acknowledge and agree that in order to complete the Project the Streetscape Easement must be amended to remove and replace the Exhibit A to accurately reflect the correct Easement Areas; and

**WHEREAS**, the Parties acknowledge and agree that the Easement Areas are accurately shown in “*Exhibit A*” attached hereto and incorporated herein by reference, and that the exhibit attached to the Streetscape Easement is hereby removed and replaced by Exhibit A of this Amended Easement;

**WHEREAS**, the Parties desire to execute this Amended Easement to accurately establish the Easement Areas as shown in Exhibit A, attached hereto.

**NOW, THEREFORE, KNOWN ALL MEN BY THESE PRESENTS**, subject to the terms and conditions set forth herein, Grantor, for good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, has bargained, granted and sold and by these presents does hereby bargain grant and sell to the Grantee, its successor and assigns, a perpetual, non-exclusive easement upon, over, along, across, through, and under the Streetscape Easement Area and Drainage Easement Area and a temporary, non-exclusive easement upon, over, along, across, through and under the Temporary Easement Area for the following purposes and as more fully set forth herein, to wit:

1. **Incorporation of Recitals.** The above recitals are hereby incorporated herein as if restated fully and are hereby made an integral part hereof so that their contents are a substantive part of this Agreement.

2. **Amendment to Streetscape Easement.** Parties agree the exhibit attached to the Streetscape Easement is hereby removed and replaced with Exhibit A to this Amended Easement, where said Exhibit A is attached hereto and incorporated herein by reference.

**TO HAVE AND TO HOLD**, subject to the conditions and limitations set forth above, all and singular, the rights, privileges and easements aforesaid unto the Grantee, their successors and assigns, forever.

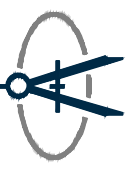
*[Remainder of Page Intentionally Omitted. Signature Page(s) and Exhibit(s) to Follow.]*







**EXHIBIT “A”**  
**(Easement Depiction)**



PRITCHARD STREET STREETScape

EASEMENT EXHIBIT

JOB NO. 2021-0735 DATE 04/23/2025

DRAWN CLA CHECKED MER APPROVED MER

SHEET

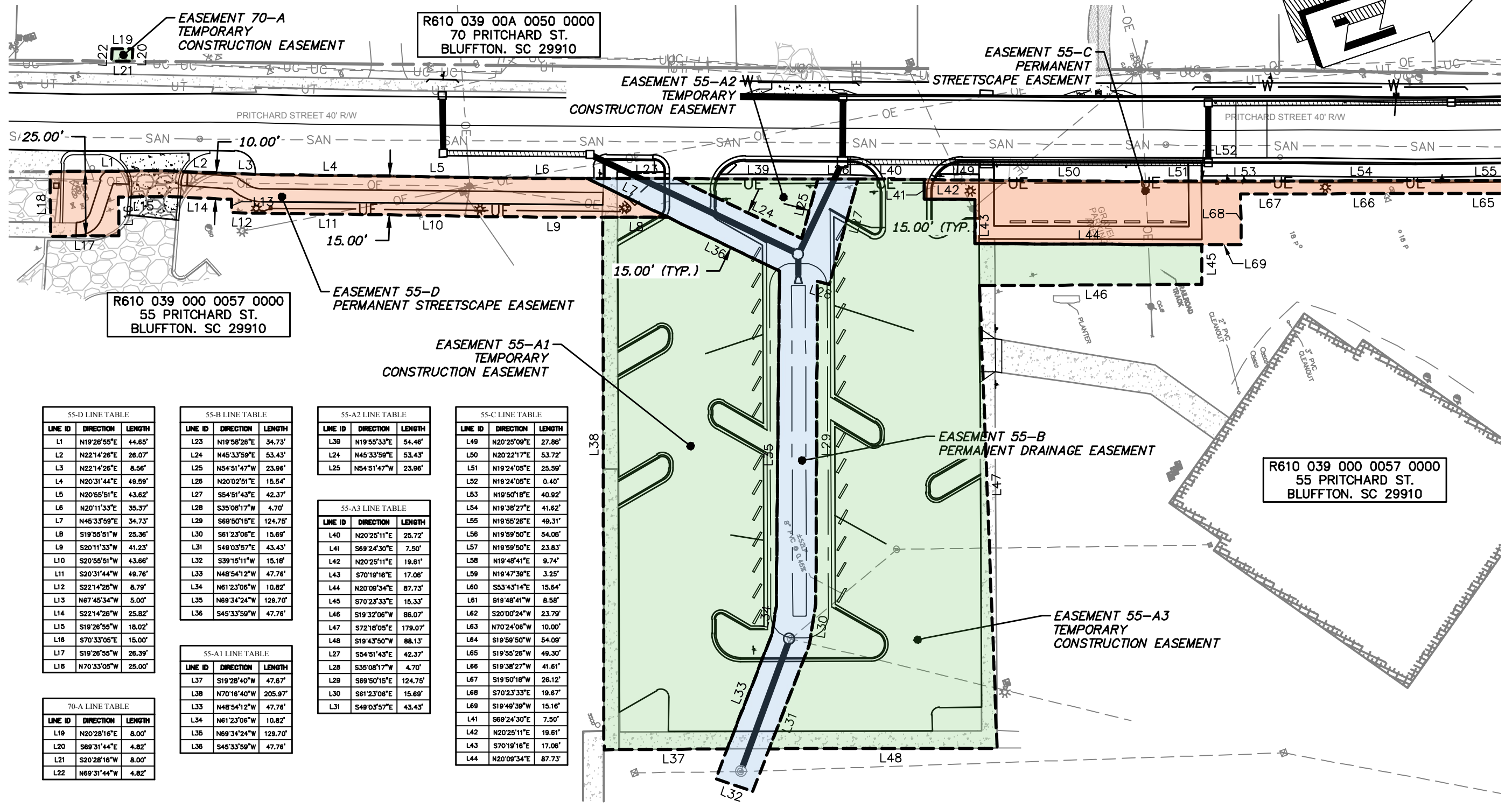
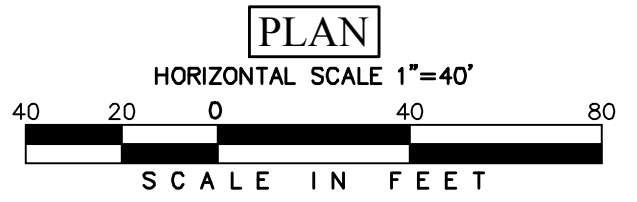
1 OF 5

EASEMENT NUMBER	EASEMENT TYPE	EASEMENT AREA
EASEMENT 55-A1	TEMPORARY	12953.43 SF
EASEMENT 55-A2	TEMPORARY	629.58 SF
EASEMENT 55-A3	TEMPORARY	15677.0 SF
EASEMENT 55-B	DRAINAGE	4684.33 SF
EASEMENT 55-C	STREETScape	4040.74 SF

EASEMENT NUMBER	EASEMENT TYPE	EASEMENT AREA
EASEMENT 55-D	STREETScape	3397.32 SF
EASEMENT 70-A	TEMPORARY	38.56 SF

**EASEMENT LEGEND**

- PERMANENT STREETScape
- PERMANENT DRAINAGE
- TEMPORARY CONSTRUCTION



**55-D LINE TABLE**

LINE ID	DIRECTION	LENGTH
L1	N19°26'55"E	44.65'
L2	N22°14'26"E	26.07'
L3	N22°14'26"E	8.56'
L4	N20°31'44"E	49.59'
L5	N20°55'51"E	43.62'
L6	N20°11'33"E	35.37'
L7	N45°33'59"E	34.73'
L8	S19°55'51"W	25.36'
L9	S20°11'33"W	41.23'
L10	S20°55'51"W	43.66'
L11	S20°31'44"W	49.76'
L12	S22°14'26"W	8.79'
L13	N67°45'34"W	5.00'
L14	S22°14'26"W	25.82'
L15	S19°26'55"W	18.02'
L16	S70°33'05"E	15.00'
L17	S19°26'55"W	26.39'
L18	N70°33'05"W	25.00'

**55-B LINE TABLE**

LINE ID	DIRECTION	LENGTH
L23	N19°58'28"E	34.73'
L24	N45°33'59"E	53.43'
L25	N54°51'47"W	23.96'
L26	N20°02'51"E	15.54'
L27	S54°51'43"E	42.37'
L28	S35°08'17"W	4.70'
L29	S69°50'15"E	124.75'
L30	S61°23'08"E	15.69'
L31	S49°03'57"E	43.43'
L32	S39°15'11"W	15.16'
L33	N48°54'12"W	47.76'
L34	N61°23'06"W	10.82'
L35	N69°34'24"W	128.70'
L36	S45°33'59"W	47.76'

**55-A2 LINE TABLE**

LINE ID	DIRECTION	LENGTH
L39	N19°55'33"E	54.46'
L24	N45°33'59"E	53.43'
L25	N54°51'47"W	23.96'

**55-C LINE TABLE**

LINE ID	DIRECTION	LENGTH
L49	N20°25'09"E	27.86'
L50	N20°22'17"E	53.72'
L51	N19°24'05"E	25.59'
L52	N19°24'05"E	0.40'
L53	N19°50'18"E	40.92'
L54	S35°08'17"E	41.62'
L55	N19°55'26"E	49.31'
L56	N19°59'50"E	54.06'
L57	N19°59'50"E	23.83'
L58	N19°48'41"E	9.74'
L59	N19°47'39"E	3.25'
L60	S53°43'14"E	15.64'
L61	S19°48'41"W	8.58'
L62	S20°00'24"W	23.79'
L63	N70°24'08"W	10.00'
L64	S19°59'50"W	54.09'
L65	S19°55'26"W	49.30'
L66	S19°38'27"W	41.61'
L67	S19°50'18"W	26.12'
L68	S70°23'33"E	19.87'
L69	S19°49'39"W	15.16'
L41	S69°24'30"E	7.50'
L42	N20°25'11"E	19.61'
L43	S70°19'18"E	17.06'
L44	N20°09'34"E	87.73'

**55-A3 LINE TABLE**

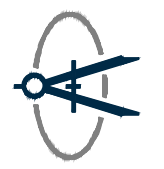
LINE ID	DIRECTION	LENGTH
L40	N20°25'11"E	25.72'
L41	S69°24'30"E	7.50'
L42	N20°25'11"E	19.61'
L43	S70°19'18"E	17.06'
L44	N20°09'34"E	87.73'
L45	S70°23'33"E	15.33'
L46	S19°32'06"W	86.07'
L47	S72°18'05"E	179.07'
L48	S19°43'50"W	88.13'
L27	S54°51'43"E	42.37'
L28	S35°08'17"W	4.70'
L29	S69°50'15"E	124.75'
L30	S61°23'08"E	15.69'
L31	S49°03'57"E	43.43'

**55-A1 LINE TABLE**

LINE ID	DIRECTION	LENGTH
L37	S19°28'40"W	47.67'
L38	N70°16'40"W	205.97'
L33	N48°54'12"W	47.76'
L34	N61°23'06"W	10.82'
L35	N69°34'24"W	128.70'
L36	S45°33'59"W	47.76'

**70-A LINE TABLE**

LINE ID	DIRECTION	LENGTH
L19	N20°28'16"E	8.00'
L20	S69°31'44"E	4.82'
L21	S20°28'16"W	8.00'
L22	N69°31'44"W	4.82'

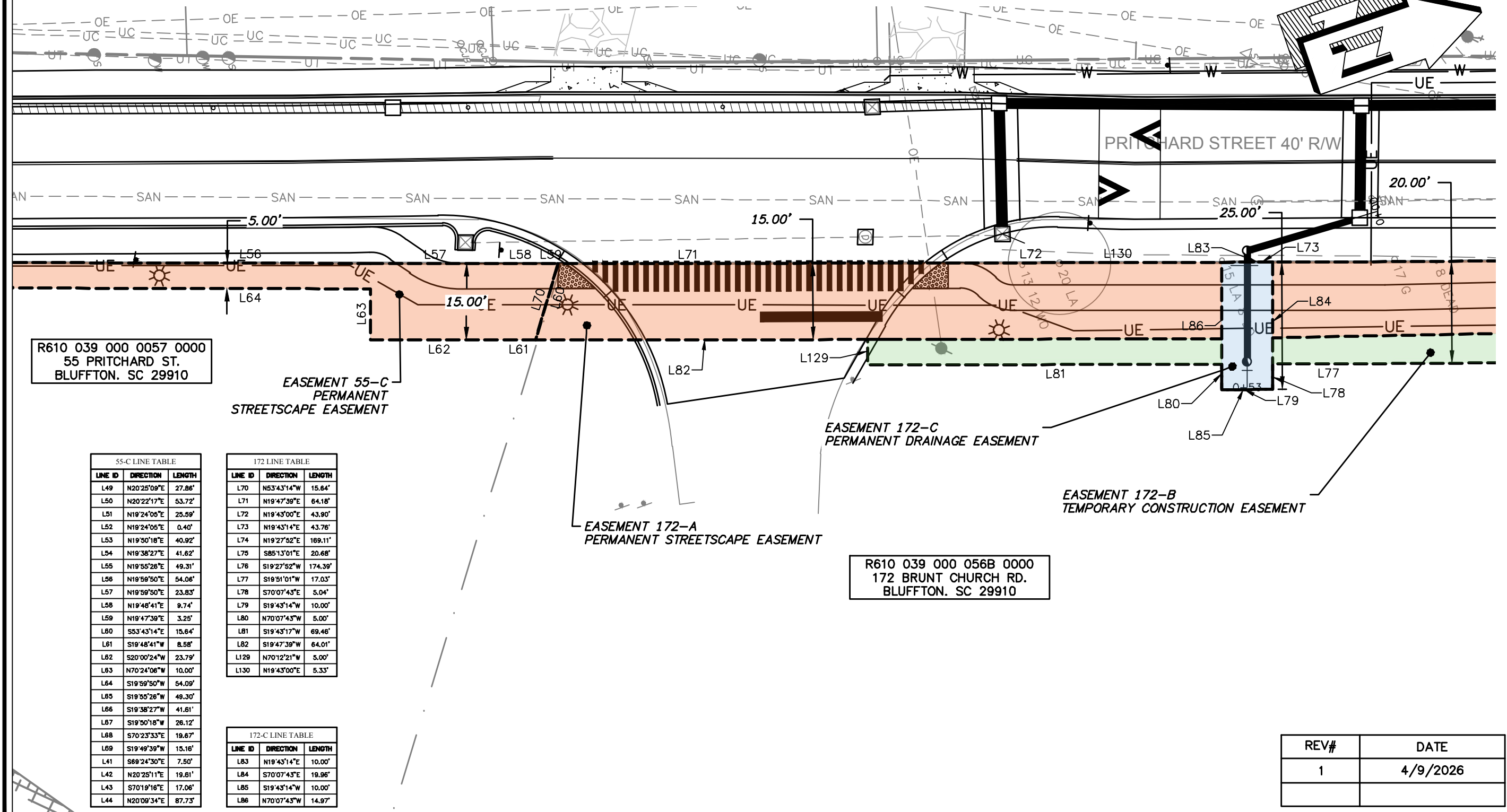
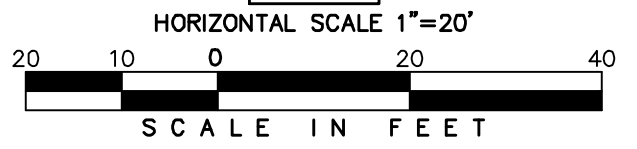


EASEMENT NUMBER	EASEMENT TYPE	EASEMENT AREA
EASEMENT 55-C	STREETSCAPE	4040.74 SF
EASEMENT 172-A	STREETSCAPE	4384.57 SF
EASEMENT 172-B	TEMPORARY	1723.12 SF
EASEMENT 172-C	DRAINAGE	250 SF

**EASEMENT LEGEND**

- PERMANENT STREETSCAPE
- PERMANENT DRAINAGE
- TEMPORARY CONSTRUCTION

**PLAN**



R610 039 000 0057 0000  
55 PRITCHARD ST.  
BLUFFTON, SC 29910

EASEMENT 55-C  
PERMANENT  
STREETSCAPE EASEMENT

EASEMENT 172-C  
PERMANENT DRAINAGE EASEMENT

EASEMENT 172-A  
PERMANENT STREETSCAPE EASEMENT

EASEMENT 172-B  
TEMPORARY CONSTRUCTION EASEMENT

R610 039 000 056B 0000  
172 BRUNT CHURCH RD.  
BLUFFTON, SC 29910

55-C LINE TABLE

LINE ID	DIRECTION	LENGTH
L49	N20°25'09"E	27.86'
L50	N20°22'17"E	53.72'
L51	N19°24'05"E	25.59'
L52	N19°24'05"E	0.40'
L53	N19°30'18"E	40.92'
L54	N19°38'27"E	41.62'
L55	N19°55'28"E	49.31'
L56	N19°59'50"E	54.06'
L57	N19°59'50"E	23.83'
L58	N19°48'41"E	9.74'
L59	N19°47'39"E	3.25'
L60	S53°43'14"E	15.64'
L61	S19°48'41"W	8.58'
L62	S20°00'24"W	23.79'
L63	N70°24'06"W	10.00'
L64	S19°59'50"W	54.09'
L65	S19°55'26"W	48.30'
L66	S19°38'27"W	41.61'
L67	S19°50'18"W	26.12'
L68	S70°23'33"E	19.87'
L69	S19°49'39"W	15.16'
L41	S69°24'30"E	7.50'
L42	N20°25'11"E	19.61'
L43	S70°19'18"E	17.06'
L44	N20°09'34"E	87.73'

172 LINE TABLE

LINE ID	DIRECTION	LENGTH
L70	N53°43'14"W	15.84'
L71	N19°47'39"E	64.18'
L72	N19°43'00"E	43.90'
L73	N19°43'14"E	43.76'
L74	N19°27'52"E	169.11'
L75	S85°13'01"E	20.68'
L76	S19°27'52"W	174.39'
L77	S19°51'01"W	17.03'
L78	S70°07'43"E	5.04'
L79	S19°43'14"W	10.00'
L80	N70°07'43"W	5.00'
L81	S19°43'17"W	69.46'
L82	S19°47'39"W	64.01'
L129	N70°12'21"W	5.00'
L130	N19°43'00"E	5.33'

172-C LINE TABLE

LINE ID	DIRECTION	LENGTH
L83	N19°43'14"E	10.00'
L84	S70°07'43"E	19.96'
L85	S19°43'14"W	10.00'
L86	N70°07'43"W	14.97'

REV#	DATE
1	4/9/2026

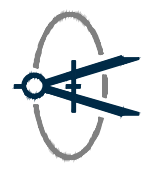
PRITCHARD STREET STREETSCAPE

EASEMENT EXHIBIT

JOB NO.	2021-0735
DATE	04/23/2025

DRAWN	CLA
CHECKED	MER
APPROVED	MER

C:\PROJECTS\2021\0735\_PRITCHARD STREET DRAINAGE IMPROVEMENTS\AC-DRAWINGS\CIVIL\2021-0735\_EASEMENT EXHIBITS.DWG 4/9/2026 1:09 PM



PRITCHARD STREET STREETScape

EASEMENT EXHIBIT

JOB NO. 2021-0735  
DATE 04/23/2025

DRAWN CLA  
CHECKED MER  
APPROVED MER

SHEET

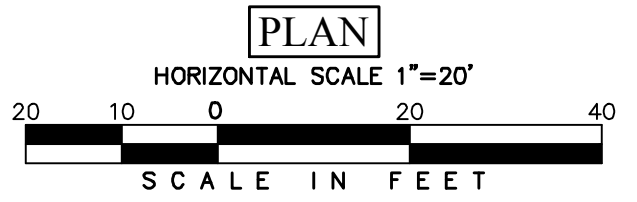
3 OF 5

EASEMENT NUMBER	EASEMENT TYPE	EASEMENT AREA
EASEMENT 172-A	STREETScape	4384.57 SF
EASEMENT 172-B	TEMPORARY	1723.12 SF
EASEMENT TRCA-C	STREETScape	149.59 SF
EASEMENT TRCA-C	TEMPORARY	208.99 SF
EASEMENT 28-A	TEMPORARY	32.54 SF

EASEMENT NUMBER	EASEMENT TYPE	EASEMENT AREA
EASEMENT 25-A	STREETScape	158.92 SF
EASEMENT 25-B	TEMPORARY	307.35 SF

**EASEMENT LEGEND**

- PERMANENT STREETScape
- PERMANENT DRAINAGE
- TEMPORARY CONSTRUCTION



**172 LINE TABLE**

LINE ID	DIRECTION	LENGTH
L70	N53°43'14"W	15.64'
L71	N19°47'39"E	64.18'
L72	N19°43'00"E	43.90'
L73	N19°43'14"E	43.76'
L74	N19°27'52"E	189.11'
L75	S85°13'01"E	20.68'
L76	S19°27'52"W	174.39'
L77	S19°51'01"W	17.03'
L78	S70°07'43"E	5.04'
L79	S19°43'14"W	10.00'
L80	N70°07'43"W	5.00'
L81	S19°43'17"W	69.46'
L82	S19°47'39"W	64.01'
L129	N70°12'21"W	5.00'
L130	N19°43'00"E	5.33'

**TRCA-C LINE TABLE**

LINE ID	DIRECTION	LENGTH
L87	N19°27'52"E	29.92'
L89	N85°13'01"W	12.41'
L96	N85°08'29"W	7.21'
L128	S19°25'43"W	29.90'

**25-A LINE TABLE**

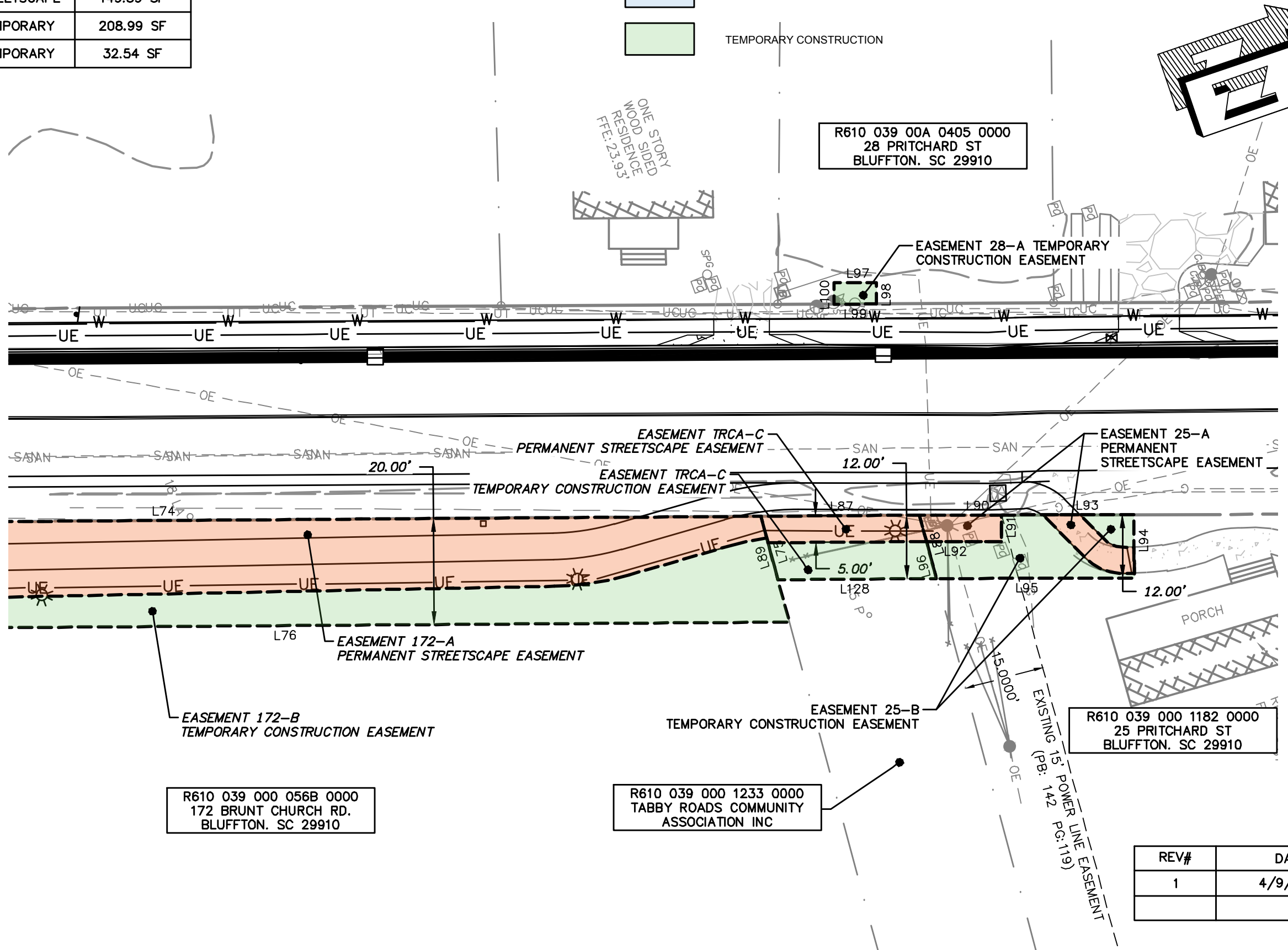
LINE ID	DIRECTION	LENGTH
L90	N19°43'33"E	15.52'
L91	S69°56'17"E	5.00'
L92	S19°43'33"W	14.16'
L88	S85°08'29"E	5.17'

**25-B LINE TABLE**

LINE ID	DIRECTION	LENGTH
L93	N19°43'33"E	24.99'
L94	S70°16'27"E	12.00'
L95	S19°46'35"W	37.33'
L96	N85°08'29"W	7.21'
L91	S69°56'17"E	5.00'
L92	S19°43'33"W	14.16'

**28-A LINE TABLE**

LINE ID	DIRECTION	LENGTH
L97	N19°33'16"E	8.00'
L98	S70°26'44"E	4.07'
L99	S19°33'16"W	8.00'
L100	N70°26'44"W	4.07'



REV#	DATE
1	4/9/2026



Attachment 2  
Proposed Motion

**Consideration of a Resolution Authorizing Acceptance of Amended Easement Donation from Beaufort County School District to Complete Portion of the Pritchard Street Streetscape and Drainage Project**

Proposed Motion

*"I move to **approve, (deny or approve as amended)** a Resolution authorizing acceptance of amended easement donation from Beaufort County School District to complete a portion of the Pritchard Street Streetscape and Drainage project."*

STATE OF SOUTH CAROLINA )  
 )  
COUNTY OF BEAUFORT )

AMENDMENT # 1  
FOR  
AGREEMENT FOR INDIGENT DEFENSE

WITNESSETH:

WHEREAS, the Agreement for Indigent Defense, was made and entered into the 17<sup>th</sup> day of June 2025 between the Town of Bluffton (hereinafter called “Bluffton”), the City of Beaufort (hereinafter called “Beaufort”), both municipal corporations organized and existing under the laws of the State of South Carolina (collectively referred to as “the Municipalities”), and the Law Office of Carol Miller (hereinafter “Attorney”); and

WHEREAS, Bluffton and Beaufort agreed to enter into a multi-party agreement with Attorney to provide independent contractor services for legal defense of indigent clients in the Municipalities’ respective Municipal Courts; and

WHEREAS, the total cost of these services was agreed to be a flat rate of Seventy Thousand (\$70,000) Dollars for work performed for Bluffton and Seventy Thousand (\$70,000) for work performed for Beaufort for an annual total of One Hundred and Forty Thousand Dollars (\$140,000) invoiced and processed by the Town of Bluffton in equal monthly increments; and

WHEREAS, Section 1 of that Agreement contemplated a one-year initial term from 7/1/2025 through 6/30/2026 with the option to renew for four (4) additional one-year terms; and

WHEREAS, the Municipalities and Attorney agree to amend the Agreement as described herein.

NOW, THEREFORE, in exchange for the mutual promises written herein and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, and intending to be legally bound, the Town and the Contractor agree as follows:

1. Municipalities and Attorney agree to renew for the one-year renewal term for the period from 7/1/2026 to 6/30/2027.
2. The rates indicated above shall remain the same.
3. All other terms and conditions of the Agreement shall remain in full force and effect and remain unchanged except as stated herein.

*[Remainder of Page Intentionally Omitted. Signature Page to Follow.]*

**IN WITNESS WHEREOF**, the parties hereto have caused the within Amendment # 1 to be executed this \_\_\_\_ day of \_\_\_\_\_, 2026.

THE LAW OFFICE OF CAROL MILLER

TOWN OF BLUFFTON

Date: \_\_\_\_\_

Date: \_\_\_\_\_

By: \_\_\_\_\_

By: \_\_\_\_\_

Print Name: \_\_\_\_\_

Print Name: \_\_\_\_\_

Position: \_\_\_\_\_

Position: \_\_\_\_\_

Witness: \_\_\_\_\_

Witness: \_\_\_\_\_

CITY OF BEAUFORT

Date: \_\_\_\_\_

By: \_\_\_\_\_

Print Name: \_\_\_\_\_

Position: \_\_\_\_\_

Witness: \_\_\_\_\_

Attachments: none

TOWN COUNCIL



STAFF REPORT  
Municipal Court Department

<b>MEETING DATE:</b>	June 9, 2026
<b>PROJECT:</b>	Consideration of a Resolution Authorizing the Renewal of a Three-Party Intergovernmental Agreement for Indigent Defense Representation at the Town of Bluffton Municipal Court with the Law Office of Carol A. Miller and City of Beaufort.
<b>PROJECT MANAGER:</b>	Lisa Cunningham, Clerk of Court

**RECOMMENDATION:** Staff requests Town Council approve a Resolution authorizing the Town Manager to sign the renewal of a Three-Party Intergovernmental Agreement for Indigent Defense Representation at the Town of Bluffton Municipal Court with the Law Office of Carol A. Miller and City of Beaufort

**BACKGROUND:**

In the 2015 the General Assembly passed a proviso mandating that municipalities fund their own attorney for indigent defense.

Municipalities were given two options; one was to enter into an agreement with the Circuit Public defender’s office or contract with a private attorney to provide indigent defense services.

December 17, 2019, the Town of Bluffton, City of Beaufort and Town of Port Royal entered into a four-party intergovernmental agreement with the 14<sup>th</sup> Circuit Public Defenders Office.

The Town of Bluffton, City of Beaufort and Town of Port Royal received a letter requesting another budget increase.

The Request for Proposal (RFP) was posted on January 3, 2025 and closed on February 26, 2026.

Only one bid was received from The Law Office of Carol A Miller.

Staff negotiated to include a three-party intergovernmental agreement with the City of Beaufort for a total cost of \$140,000.00 that would be divided equally among both municipalities.

The fiscal impact to the Town of Bluffton would be \$70,000.00.

On June 10, 2025, Town Council approved a resolution authorizing the Town Manager to execute a three-party intergovernmental agreement with the Law Office of Carol A. Miller and the City of Beaufort for indigent defense representation at the Town of Bluffton Municipal Court. The agreement was approved for a one-year term with an option to renew and is scheduled to expire on June 30, 2026.

**NEXT STEPS:**

Upon Town Council's review and approval of this request, the Town Manager will renew the intergovernmental agreement with the Law Office of Carol Miller and the City of Beaufort. The renewed contract term will begin on July 1, 2026.

**ATTACHMENTS:**

1. Agreement
2. Resolution
3. Motion

STATE OF SOUTH CAROLINA )  
 )  
COUNTY OF BEAUFORT )

AMENDMENT # 1  
FOR  
AGREEMENT FOR INDIGENT DEFENSE

WITNESSETH:

WHEREAS, the Agreement for Indigent Defense, was made and entered into the 17<sup>th</sup> day of June 2025 between the Town of Bluffton (hereinafter called "Bluffton"), the City of Beaufort (hereinafter called "Beaufort"), both municipal corporations organized and existing under the laws of the State of South Carolina (collectively referred to as "the Municipalities"), and the Law Office of Carol Miller (hereinafter "Attorney"); and

WHEREAS, Bluffton and Beaufort agreed to enter into a multi-party agreement with Attorney to provide independent contractor services for legal defense of indigent clients in the Municipalities' respective Municipal Courts; and

WHEREAS, the total cost of these services was agreed to be a flat rate of Seventy Thousand (\$70,000) Dollars for work performed for Bluffton and Seventy Thousand (\$70,000) for work performed for Beaufort for an annual total of One Hundred and Forty Thousand Dollars (\$140,000) invoiced and processed by the Town of Bluffton in equal monthly increments; and

WHEREAS, Section 1 of that Agreement contemplated a one-year initial term from 7/1/2025 through 6/30/2026 with the option to renew for four (4) additional one-year terms; and

WHEREAS, the Municipalities and Attorney agree to amend the Agreement as described herein.

NOW, THEREFORE, in exchange for the mutual promises written herein and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, and intending to be legally bound, the Town and the Contractor agree as follows:

1. Municipalities and Attorney agree to renew for the one-year renewal term for the period from 7/1/2026 to 6/30/2027.
2. The rates indicated above shall remain the same.
3. All other terms and conditions of the Agreement shall remain in full force and effect and remain unchanged except as stated herein.

*[Remainder of Page Intentionally Omitted. Signature Page to Follow.]*

IN WITNESS WHEREOF, the parties hereto have caused the within Amendment # 1 to be executed this day of \_\_\_\_\_, 2026.

THE LAW OFFICE OF CAROL MILLER

TOWN OF BLUFFTON

Date: 4/28/26

Date: \_\_\_\_\_

By: Carol A Miller

By: \_\_\_\_\_

Print Name: Carol A Miller

Print Name: \_\_\_\_\_

Position: Attorney

Position: \_\_\_\_\_

Witness: [Signature]

Witness: \_\_\_\_\_

CITY OF BEAUFORT

Date: 4/28/26

By: Scott M. Marshall

Print Name: SCOTT M. MARSHALL

Position: CITY MANAGER

Witness: [Signature]

Attachments: none

**A RESOLUTION**

RELATING TO THE TOWN OF BLUFFTON, SOUTH CAROLINA, SUPPORT OF A THREE-PARTY INTERGOVERNMENTAL AGREEMENT FOR A INDIGENT DEFENSE REPRESENTATION AT THE TOWN OF BLUFFTON AND CITY OF BEAUFORT.

**WHEREAS:** Contract was entered into the 1<sup>st</sup> , day of July 2026 between the Town of Bluffton, City of Beaufort and Carol A. Miller for Indigent Defense Services.

**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 a Three-Party Intergovernmental Agreement for Indigent Defense Representation at the Town of Bluffton Municipal Court with the Law Office of Carol A. Miller and City of Beaufort.

Approved this 9<sup>th</sup> day of June 2026.

---

Larry Toomer, Mayor  
 Town of Bluffton, South Carolina

ATTEST:

---

Marcia Hunter, Town Clerk

SEAL

Attachment 3

Recommended Motion

Consideration to Approve a Resolution for Execution of a Three-Party Intergovernmental Agreement for Indigent Defense Representation at the Town of Bluffton Municipal Court with the Law Office of Carol A. Miller and City of Beaufort.

“I move to **Approve** the Resolution authorizing the Town Manager to sign the renewal of the Three-Party Intergovernmental Agreement for Indigent Defense Representation at the Town of Bluffton Municipal Court with the Law Office of Carol A. Miller and City of Beaufort”.

TOWN COUNCIL



STAFF REPORT  
Police Department

<b>MEETING DATE:</b>	June 9, 2026
<b>PROJECT:</b>	Municipal Court Prosecutor (Fiscal Impact – \$40,000)
<b>PROJECT MANAGER:</b>	Joe Babkiewicz, Chief of Police

**REQUEST:** Town Staff requests Town Council to authorize the Town Manager to negotiate and execute a contract (Attachment 1) with a law firm or solo attorney in an independent contractor capacity to serve as the prosecutor in the Bluffton Municipal Court.

The total contract amount is within the approved budget limits established with the Adopted Consolidated Municipal Budget for Fiscal Year (FY) 2027.

**BACKGROUND:** Since 2022, the Town of Bluffton has had an agreement with The Law Office of Darrell Thomas Johnson, Jr., LLC to use the services of Attorney Joshua Fester as the prosecutor in the Bluffton Municipal Court. On 5/15/2026, Attorney Fester provided formal notice that he had the wonderful opportunity to be appointed to the Jasper County Magistrate bench, and as such could no longer serve as the Town prosecutor. His last day in Municipal Court was 5/19.

On 5/20, Town staff published a solicitation for the position on the Town website, on South Carolina Business Opportunities, and on the Municipal Association of South Carolina’s jobs page. In addition, staff requested that it be shared with the Hilton Head Bar Association and the Young Lawyer’s Section; confirmation was received that the position was shared.

**NEXT STEPS:** Inquiries have been received from two attorneys as of this writing. Their proposals, including their resume and references, are due to Town staff on 6/10, whereupon interviews will be conducted. Because time is of the essence, staff is providing Town Council with the format of the agreement at the 6/9 meeting in lieu of waiting until the 7/14 meeting. If Town Council approves of the format of the agreement, the Town Manager can negotiate an arrangement within budget and secure the services of a prosecutor as soon as possible.

**SUMMARY:** Authorize the Town Manager to negotiate and execute a contract substantially similar to the attached for prosecutorial services for the Bluffton Municipal Court.

**ATTACHMENTS:**

1. Draft Contract

STATE OF SOUTH CAROLINA )  
COUNTY OF BEAUFORT )

TOWN OF BLUFFTON AGREEMENT  
NUMBER 2026-53

THIS AGREEMENT is made the \_\_\_\_ of \_\_\_\_\_, 2026 between the \_\_\_\_\_ (hereinafter called "Consultant") 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 desires a local, properly licensed and experienced attorney to serve as its part-time prosecutor in the Bluffton Municipal Court; and

WHEREAS, the Town and Consultant desire to enter into an Agreement wherein the Consultant shall provide such services as set forth herein below:

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 Consultant, the parties hereto agree as follows:

1. Services/Schedule: The Consultant shall perform services per the attached scope of work in Attachment 1. The term of this contract shall be one (1) year with the option to renew for up to four (4) additional one-year periods upon mutual written agreement by the parties. **The term shall begin July 1, 2026 and end June 30, 2027.**
2. Fees: The total cost of these services shall be a flat rate of \$40,000 per year invoiced on a monthly basis per Attachment 1. The assumptions on which the pay rate is predicated and the pay rate itself may be revisited once annually at least 90 days prior to the exercise of any options for contract renewal.
3. Invoicing: The Consultant shall send invoices via email simultaneously to [invoice@townofbluffton.com](mailto:invoice@townofbluffton.com) and to their Town project manager. Invoices may also be sent to the Town of Bluffton, PO Box 386 Bluffton, SC 29910, Attn: Accounts Payable if emailing is not possible. The invoice should reference contract number 2026-53 and the purchase order associated with the task order. Approved invoices shall be paid within 30 days upon receipt of the invoice in the Finance Department.
4. General Terms and Conditions:
  - a. The Consultant shall be required to maintain the appropriate amounts and coverages of insurance for auto liability, professional malpractice, and workers compensation as identified in Attachment 2 for the entire length of the agreement. The Consultant is required to immediately contact the Town should any change to these policies occur during the course of the performance of this contract. Failure to maintain these policies is grounds for termination.
  - b. Work shall commence **July \_\_, 2062** and the invoice shall not be prorated but instead paid in full.
  - c. Consultant shall be licensed to perform the work including, but not limited to, a current Town of Bluffton Business License and any required State of South Carolina license.
  - d. Consultant shall comply with the most current Federal and State of South Carolina Laws and Regulations, including but not limited to, Fair Labor Standards Act and Occupational Safety and Health Administration guidelines.
  - e. Consultant may not subcontract to another law firm without the prior express written consent of the Town on a case-by-case basis.
  - f. Either party may terminate with sixty (60) days' written notice. The Town Manager or his designee may terminate this contract in whole or in part at any time for the convenience of the Town. If the contract is terminated for the convenience of the Town, the Town will pay the Consultant a prorated amount for that month.

- g. Should any part of this Agreement be rendered void, invalid or unenforceable by a court of law, such a determination shall not render void, invalid or unenforceable any other part of this Agreement.
- h. 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.
- i. This Agreement may not be modified nor any additional work performed unless such modification or work is approved in writing and signed by both parties. The Consultant may not assign this contract without the prior written approval of the Town.
- j. The Consultant shall defend, indemnify, and hold harmless the Town, its officers, directors, agents, and employees from and against any and all actions, costs, claims, losses, expenses, and/or damages, including attorney's fees, whether incurred prior to the institution of litigation, during litigation, or an appeal arising out of or resulting from the conduct of any activity hereby authorized or the performance of any requirement imposed pursuant by this Agreement, however caused or occasioned, unless caused by the willful misconduct or gross negligence of the Town.
- k. In the event the Town must proceed to litigation to protect or enforce its rights, the Town shall be entitled to recover its reasonable attorney fees and costs.
- l. Consultant shall perform the work consistent with the professional skill and care ordinarily provided by members of its profession practicing under similar circumstances.
- m. The parties hereto intend that no master/servant, employer/employee, or principal/agent relationship will be created by the Agreement. Nothing contained herein creates any relationship between the Town and Consultant 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 the Consultant's agents and employees and methods utilized in fulfilling its obligations hereunder shall lay solely and exclusively with the Consultant. The Consultant's agents or employees shall not be considered employees of the Town for any purpose. No person employed by the Consultant shall have any benefits, status, or right of employment with the Town.

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

_____	TOWN OF BLUFFTON
Date: _____	Date: _____
By: _____	By: _____
Print Name: _____	Print Name: _____
Position: _____	Position: _____
Witnesses: _____	Witnesses: _____

- Attachments:
1. Scope of Work and Fee Schedule
  2. Insurance

**ATTACHMENT 1**

**SCOPE OF WORK**

The scope of services to be provided by Consultant shall include but not be limited to:

1. Represent the Town of Bluffton in the prosecution offenses heard in the Bluffton Municipal Court including misdemeanors and traffic cases for which a sentence of incarceration may be imposed.
2. Perform as trial counsel in those proceedings, including witness preparation, officer preparation, review of video or other evidence, conducting of legal research, and preparation of all motions.
3. Act as negotiator between Defendant's attorney or with Pro Se Defendants to reach a plea agreement where appropriate.
4. Attend all scheduled court sessions, scheduled Tuesdays commencing at 9:00 am until court is adjourned.
5. Flat pay rate is inclusive of direct costs including printing, photography, photocopying, courier services, service of process, filing fees, travel costs and other actual costs.
6. Flat rate is predicated on an assumed time commitment of approximately 15-20 hours per week; assumptions and pay rate may be revisited on an annual basis at least 90 days prior to the exercise of any options for contract renewal.

Services will primarily be fulfilled by Attorney \_\_\_\_\_ but may be performed by any qualified and experienced member of the Consultant's firm. The Town reserves the right to request which attorney will or will not fulfill the work of this Agreement.

Consultant shall provide invoices via the method specified in this Agreement on a monthly basis.

Consultant shall provide summary reports of case dispositions on a monthly basis via email to Chief of Police Joe Babkiewicz at [jbabkiewicz@townofbluffton.com](mailto:jbabkiewicz@townofbluffton.com)

**ATTACHMENT 2**  
**INSURANCE COVERAGES**

Workers Compensation – Consultant shall maintain Worker’s Compensation Insurance & Employers Liability in accordance with the State of South Carolina Code.

Business Auto Policy – Consultant shall maintain Business Automobile Liability at a limit of liability not less than \$500,000 each occurrence for all owned, non-owned and hired automobiles.

Professional Liability (for Professional Services only) – Consultant shall maintain Professional Liability or equivalent Errors & Omissions Liability at a limit of liability not less than \$1,000,000 Per Occurrence. When a self-insured retention (SIR) or deductible exceeds \$10,000, the Town reserves the right, but not the obligation, to review and request a copy of Vendors most recent annual report or audited financial statement.

The Certificate of Insurance shall unequivocally provide thirty (30) days written notice to the Town prior to any adverse changes, cancellation, or non-renewal of coverage thereunder. Said liability insurance must be acceptable by and approved by the Town as to form and types of coverage.



## **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](http://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](mailto: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](mailto: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. Joe George	Quartermaster	843-706-4557	<a href="mailto:jgeorge@townofbluffton.com">jgeorge@townofbluffton.com</a>
2. Joe Babkiewicz	Police Chief	843-540-3949	<a href="mailto:jbabkiewicz@townofbluffton.com">jbabkiewicz@townofbluffton.com</a>

**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 Town's portion of the one-time setup fee is \$2,085. and the Town's 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 Town's behalf and the Town will be billed & invoiced during the 1<sup>st</sup> 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](mailto: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 1<sup>st</sup>, 2025, and will remain valid through June 30<sup>th</sup>, 2026. 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                      Date  
BTFD Vehicle Services

\_\_\_\_\_  
Fire Chief David Hindman              Date  
Bluffton Township Fire District

\_\_\_\_\_  
Stephen Steese                              Date  
Town Manager  
Town of Bluffton



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, proms, 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 2025, through 11:59 PM on the 30th day of June 2026 (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 30<sup>th</sup> 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](mailto: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**

<b>Annual Costs for School Fiscal Year 2026/2027</b>		
75%	25%	100%
\$544,470.00	\$181,489	\$725,959

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.

<b>Extra-duty assignment hourly rate (requires 2 hour min)</b>	<b>\$60.00 per hour</b>
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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 2026-2027

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 Simmonsville 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 9<sup>th</sup> 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, 2026 through June 30, 2027 (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 2026-2027 school year is **\$158,392** 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:

\_\_\_\_\_  
Dr. Frank Rodriguez                      *date*  
Superintendent  
Beaufort County School District

\_\_\_\_\_  
Stephen Steese                                      *date*  
Town Manager  
Town of Bluffton



L. Eden Hendrick  
Executive Director

P.O. Box 21069  
Columbia, SC 29221-1069  
djj.sc.gov

Henry McMaster  
Governor

Section XI. Item #7.



July 1, 2025

Town of Bluffton  
Administrator

20 Bridge Street  
Bluffton, South Carolina 29910-036

This is the FY26 renewal. FY27 is still pending receipt from the State.

Dear Administrator:

Enclosed please find a Memorandum of Agreement (MOA) for the provision of secure detention services with the South Carolina Department of Juvenile Justice's (SCDJJ) Juvenile Detention Complex for fiscal year 2025-2026.

Pursuant to S.C. Code of Laws §63-19-1610, the per diem rate for operational costs is **\$50.00 per day** for any youth housed at a SCDJJ detention facility. Pursuant to Proviso 67.17 of the Fiscal Year 2025-2026 budget, local governments utilizing a SCDJJ detention facility will pay an additional capital expenditure charge of **\$125.00 per day** for the first 25 days a youth is detained. Furthermore, pursuant to S.C. Code of Laws § 63-19-360(4) and §16-19-850, all transportation to and from a SCDJJ detention facility is the responsibility of the detaining law enforcement agency/department.

This MOA will not obligate you in any way unless your agency/department chooses to, or is ordered by a court to, detain a youth awaiting disposition. Should you anticipate the need to use a SCDJJ secure detention facility anytime during the 2025-2026 fiscal year, please sign the enclosed MOA and return to: SC Department of Juvenile Justice, Attention: Deputy Director Priscilla Pee, Midlands Evaluation and Development Center, 4900 Broad River Road, Columbia, SC 29212. **This agreement will not be accepted by SCDJJ if altered or amended in any way.**

As an alternative to detaining youth in a SCDJJ secure detention facility, SCDJJ has developed a Short-Term Alternative Placement (STAP) Program by contracting with providers throughout the state to offer residential services for non-violent youth. This STAP service is made available at no cost. An additional benefit to utilizing STAP is that while local law enforcement provides initial transport to the STAP location, SCDJJ arranges all follow-up transports to/from Court. **We would encourage you to make all public safety or local law enforcement in your jurisdiction aware of this alternative to secure detention so that they can utilize this no cost option, whenever they determine such to be appropriate.** Additional information about these options can be obtained by contacting your local SCDJJ County Director or by calling SCDJJ's Office of Community Alternatives at (803) 896-9117.

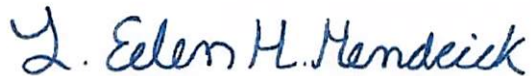
With the implementation of Raise the Age legislation on July 1, 2019, along with other factors, SCDJJ's Juvenile Detention Complex has experienced a higher volume of detainees. Please be

advised, due to the high number of youth, certain processes and procedures may take longer than expected, including admission to and release from the facility.

As stated above, SCDJJ has developed STAP beds for use as an alternative to detention for non-violent youth and encourages the use of STAP beds with appropriate youth. In addition, to ensure that your jurisdiction has a long-term solution in place for the detention of youth and to reduce transportation time to/from a secure detention facility, please consider collaborating with your local government partners in neighboring jurisdictions to explore the establishment of regional juvenile detention centers in your area.

Should you have any questions, please contact Priscilla Pee, Deputy Director of Security and Operations, at (803) 896-9311. Your timely response is appreciated.

Sincerely,



L. Eden Hendrick  
Executive Director

Enclosure

cc: Matthew Rameriz, Associate Deputy Director  
Priscilla Pee, Deputy Director

**MEMORANDUM OF AGREEMENT  
FOR THE DETENTION OF YOUTH**

**THIS AGREEMENT** is made this 1<sup>st</sup> day of July, 2025, by and between the South Carolina Department of Juvenile Justice (SCDJJ), by and through its duly authorized employee, and the governing body of Town of Bluffton, hereinafter referred to as Town of Bluffton, by and through its duly authorized official and/or employee.

**WHEREAS**, the South Carolina Constitution and state and federal law, mandate that youth who are held in detention be confined in separate and distinct facilities from adults similarly confined; and

**WHEREAS**, Town of Bluffton does not operate or manage its own detention facility for youth; and

**WHEREAS**, SCDJJ operates a detention facility for youth, along with an array of other residential placements for youth, who are awaiting their return to another jurisdiction or state, or awaiting their adjudication and/or dispositional hearings in the Family Courts of this State, which have passed all necessary state inspections or approvals, and are suitable for the detention of youth; and

**WHEREAS**, the General Assembly has mandated that “the governing body of the law enforcement agency having original jurisdiction (over) where the offense occurred” and that “[l]ocal governments utilizing the juvenile detention services provided by the Department of Juvenile Justice” be responsible for paying a portion of the costs of the detention services provided by SCDJJ for youth who are charged with committing crimes within the governing body’s jurisdictional limits or ordered by the Family Court to be detained.

**NOW THEREFORE**, in consideration of the mutual promises contained herein, it is agreed as follows:

SCDJJ will admit into its Juvenile Detention Complex in Columbia, and detain such youth in this Complex, subject to its design/operational capacity and any limitations set forth in Section 63-19-830(A), those youth who are charged with committing offenses within the jurisdictional limits of the above listed entity and who have been/are:

1. qualified to be placed in secure detention (as determined by Section 63-19-820(B)), which the local law enforcement entity wishes to have detained prior to a detention hearing before the Family Court; or
2. ordered to be taken into custody and detained by the Family Court or other lawful authority; or
3. 16 years old or younger who have been waived to the Court of General Sessions to be tried as adults; or
4. 16 years old and charged as an adult with committing a Category A-D felony or any felony offense which provides for a maximum term of imprisonment of fifteen years or more (applicable only to crimes alleged to have occurred prior to 7/1/2019).

Persons 17 years old and older who are charged as adults will not be admitted to SCDJJ’s Juvenile Detention Complex. Acceptance and retention of detainees in its Juvenile Detention Complex will

be on a space available basis and will be in accordance with admission and detention criteria established by SCDJJ. In addition, Town of Bluffton agrees to remove any detainees accepted and detained under criteria 3 and 4 above, on or within one week after that detainee's 17<sup>th</sup> birthday.

Town of Bluffton agrees to assign an open Purchase Order Number 2015-03, to be effective from July 1, 2024 to June 30, 2025.

Town of Bluffton agrees to comply with Section 63-19-1610 of the South Carolina Code of Laws which provides, "local governments utilizing the juvenile detention services provided by the Department of Juvenile Justice must pay the department a per diem of fifty dollars a day per child." Accordingly, Town of Bluffton will pay SCDJJ \$50.00 per 24-hour day per child. (Detention periods of between from 1 to 23 hours shall be charged as a ½ day charge of \$25.00). Town of Bluffton will make payments to SCDJJ on a monthly basis as the costs accrue.

In addition, Town of Bluffton agrees to comply with Proviso 67.17 as contained in the Fiscal Year 2025-2026 budget:

67.17. (DJJ: Capital Expenditure Charge) Local governments utilizing the juvenile detention services provided by the Department of Juvenile Justice shall pay a capital expenditure charge of \$125 per day per child not to exceed 25 days to the department for new admissions after July 1, 2025, to cover capital expenditures and investments in the facilities that house such juveniles. This capital expenditure is in addition to the per diem charge of \$50 that offsets operating expenses. If full funding is not received from the local governments, then the remainder of the funds due shall be transferred to the department from the local government fund on behalf of such local governments. The transfer to the department on behalf of the local government shall be deemed to have been distributed to the local government.

Accordingly, Town of Bluffton will pay SCDJJ an additional \$125.00 per day per child for the first 25 days the child is detained. A child being detained any portion of a day will result in a \$125.00 charge for that day. Town of Bluffton will make payments to SCDJJ on a monthly basis as the costs accrue.

SCDJJ agrees to bill Town of Bluffton on a monthly basis; said bills to be sent on or before the 15<sup>th</sup> day of the month after the month where the costs are incurred. Town of Bluffton agrees to make payment to SCDJJ on or before the first (1<sup>st</sup>) day of the following month. If Town of Bluffton fails to make payment within 30 days of receipt of an invoice for detention services, SCDJJ may take any and all available measures to collect on the outstanding debt.

Pursuant to South Carolina Code Section 63-19-360, the "local law enforcement agency having jurisdiction where the offense was committed" shall be responsible for transporting all youth to and from DJJ's Juvenile Detention Complex. However, a local law enforcement entity may enter into agreements with other local law enforcement agencies or other entities for transporting of a youth to and from SCDJJ's Juvenile Detention Complex, and the fact that a particular local law enforcement agency or entity transports a youth to or from SCDJJ shall not be determinative as to which law

enforcement agency has jurisdiction over the offense committed or necessarily obligate the governing board of the transporting entity to pay for the cost of that youth detention.

In accordance with state law relating to Juvenile Detention and consistent with the criteria outlined in SCDJJ Policy 408 (Community Detention Screening and Detention Hearing Process), no youth shall be placed in and/or transported to a SCDJJ detention facility until law enforcement has notified SCDJJ and SCDJJ has conducted a detention screening, or until a Family Court Judge has determined that placement in secure detention is appropriate.


Town of Bluffton shall provide the SCDJJ Juvenile Detention Complex with all relevant information pertaining to the youth, including medical history/limitations/pre-existing conditions, known psychological and psychiatric problems, charges pending before the court, and completed screening or detention forms if such records or information are in the possession of, or otherwise known to, the transporting law enforcement agency.

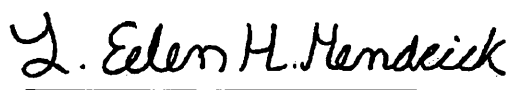
SCDJJ's Juvenile Detention Complex shall have the right to refuse admission when a youth is presented for placement without an appropriate detention order signed by the Court or detention referral papers, completed and signed by a SCDJJ employee or screening agent. SCDJJ's Juvenile Detention Complex shall also have the right to refuse admission when a youth is deemed inappropriate by the Complex for placement due to age, not meeting referral/admissions criteria, indications of alcohol or other drug intoxication, medical condition which requires emergency or immediate medical care or treatment or for any other reason which puts the Complex at risk, should such a youth be accepted.

SCDJJ shall not be financially responsible for the cost of medical care provided to a youth detained in its Juvenile Detention Complex for any injury, illness, condition, or medical need that pre-existed the youth's admission to its Detention Complex.

Detention services provided by SCDJJ shall commence upon execution of this contract and terminate, unless this contract is reauthorized and renewed, on July 1, 2026. Either party may cancel this agreement upon thirty (30) days' written notice.

**APPROVED:**

  
\_\_\_\_\_  
Administrator/Manager  
(or other Authorized Official)

  
\_\_\_\_\_  
L. Eden Hendrick, Director  
South Carolina Department of Juvenile Justice

7/22/2025  
\_\_\_\_\_  
Date

July 1, 2025  
\_\_\_\_\_  
Date