



## Regular Town Council Meeting

Tuesday, January 14, 2025 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 113 or on Spectrum Channel 1304.

#### I. CALL TO ORDER

#### II. PLEDGE OF ALLEGIANCE

#### III. INVOCATION

#### IV. ADOPTION OF THE MINUTES

- [1.](#) Regular Meeting Minutes of 12/10/2024

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

1. Beaufort County School District Character Student of the Month - Mayor Larry Toomer
2. Martin Luther King, Jr. Proclamation - Mayor Larry Toomer
3. Annual Palmetto Bluff Development Agreement Update - Will Howard, South Street Partners
- [4.](#) Town of Bluffton Annual Development Agreement Update - Kevin Icard, Director of Growth Management
5. Annual Update From Bluffton Police Department Mental Health Advocate - Lisa Carlucci, Community Mental Health Advocate

#### VI. PUBLIC COMMENT

#### VII. COMMUNICATIONS FROM MAYOR AND COUNCIL

#### VIII. COUNCIL WORKSHOP AGENDA ITEMS

#### IX. PUBLIC HEARING & FINAL READING

#### X. FORMAL AGENDA ITEMS

- [1.](#) Consideration of an Ordinance Authorizing an Economic Development Incentive Agreement Between the Town of Bluffton and Encompass Health. Second & Final Reading – David Nelems, CEO of DRCI

- [2.](#) Consideration of an Ordinance Authorizing an Economic Development Incentive Agreement Between the Town of Bluffton and CS Instruments USA Inc. Second & Final Reading – David Nelems, CEO of DRCI
- [3.](#) Approval to Authorize a Task Authorization to McCormick Taylor, Inc. to Develop Wetland and Resilience Ordinances (Fiscal Impact: \$174,004.55) - Kimberly Washok-Jones, Director of Projects and Watershed Resilience
- [4.](#) Consideration of an Ordinance Amending the Town of Bluffton FY 2025 Budget to Provide for the Expenditures of Certain Funds and to Allocate Sources of Revenue for the Said Funds – First Reading - Natalie Majorkiewicz, Director of Finance

#### **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 to Authorize a Contract Renewal with Palmetto Bluff Preservation Trust, Inc. to reimburse for residential trash removal services in the Palmetto Bluff community for the calendar year 2025 (Fiscal Impact: \$193,744). – Chris Forster, Assistant Town Manager
- [4.](#) Acceptance of the Town of Bluffton FY2024 Audit performed by Mauldin and Jenkins, LLC - Natalie Majorkiewicz, Director of Finance

#### **XII. EXECUTIVE SESSION**

1. Discussion Related to the Proposed Conveyance of Development Rights for the Purpose of Affordable Housing in the Buckwalter PUD (Pursuant to SC Freedom of Information Act 30-4-70[a][2])

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

#### **XIV. ADJOURNMENT**

**NEXT MEETING DATE: TUESDAY, FEBRUARY 11, 2025**



*“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  
December 10, 2024

---

### **I. CALL TO ORDER**

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

### **II. PLEDGE OF ALLEGIANCE**

The Pledge of Allegiance was led by Mayor Toomer.

### **III. INVOCATION**

The Invocation was given by Mayor Pro-Tempore Wood.

### **IV. ADOPTION OF THE MINUTES**

#### **1. Regular Meeting Minutes of 11/12/2024**

A motion was made by Councilmember Hamilton; Seconded by Councilmember Burden to approve the Regular Meeting Minutes of 11/12/2024 as submitted.

#### **2. Town Council Quarterly CIP Workshop of 10/15/2024**

A motion made by Mayor Pro-Tempore Wood; Seconded by Councilmember Hamilton to approve the Quarterly CIP Workshop of 10/15/2024 as submitted.

#### **3. Revision of Regular Meeting Minutes of 09/10/2024**

A motion was made by Councilmember Frazier; Seconded by Mayor Pro-Tempore Wood to approve the revision of Regular Meeting Minutes of 09/10/2024 as submitted.

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

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

On behalf of Town Council, Mayor Larry Toomer honored the student of the month, Kendall Brodie, for courage and tolerance for her spirit and perseverance during her cancer journey. Kendall is a 4th grader at Red Cedar Elementary School.

#### **2. National Impaired Driving Prevention Month Proclamation - Mayor Larry Toomer**

On behalf of Town Council, Mayor Larry Toomer, presented a proclamation to Aviana Stevens and Mauricio Macias representatives of the Lowcountry Alliance for Healthy Youth to raise awareness about distracted driving and teaching others about safe driving habits.

#### **3. Presentation of Awards for Christmas Parade Winners - Mayor Larry Toomer**

2024 Bluffton Christmas Parade Winners:

Best Performance: Dolphin Pride -Battery Creek High School Marching Band

Best Float: Spirit of Sebastian Foundation

“State of Mind” Award: Taylor's Landscape Supply & Nursery

**VI. PUBLIC COMMENT**

Joy Coe 5 Cottingham Rd - Ms. Coe expressed concerns and asked questions regarding the Workshop Item for the Willow Run Tract. She referenced development rights and ownership of the parcel.

Sharon Brown 163 Buck Island Road - Ms. Brown expressed her opinions of racial injustices of the black community and communications with town staff.

**VII. COMMUNICATIONS FROM MAYOR AND COUNCIL**

Councilmember Burden - Ms. Burden applauded Kendall Brodie for her strength and courage during her journey with illness. She also encouraged the public to give to the toy drive in this season of giving.

Councilmember Hamilton - Mr. Hamilton stated he encourages everyone to spread love wherever you go this Advent season of hope, peace and joy.

Councilmember Wood - Mr. Wood, has encouraged everyone to lift one another this season. He thanked all staff for their efforts to make the Christmas Parade and weekend a success. He also talked about the cleanup of the parade and how impressive it is for the streets to be cleaned up immediately following the parade and it is like the parade did not occur.

Mayor Toomer - Mayor Toomer thanked town staff for the tree lighting, parade and cleanup. He stated he had received feedback regarding the streets being shut down a few minutes earlier. After inquiring as to why and learning the cause was the bomb dogs being brought in to sweep the entire route of the parade, he felt closing the streets for the safety of everyone was acceptable and warranted the inconvenience.

Councilmember Frazier – No communications this evening.

**VIII. WORKSHOP AGENDA ITEMS**

1. Direction and Input on Proposed Amendments to the Buckwalter Development Agreement and Concept Plan regarding the Willow Run Tracts and fulfillment of the Memorandum of Understanding between the Town and the Beaufort County School District – Kevin Icard, Director of Growth Management

Town Council discussed the elements of the proposed amendments to the Buckwalter Development Agreement and Concept Plan, asking staff members to consider road infrastructure, wetland preservation, possible sport facilities as this development agreement moves forward to next steps which include the Development Review Committee – Planning Commission and back to Town Council.

These amendments are designed to remove a portion of development rights and reduces density in the Town of Bluffton.

**IX. PUBLIC HEARING & FINAL READING**

1. Consideration of Ordinances Related to Certain Property Owned by Rose Kitty and Ferrellgas Inc., Consisting of a Total of 1.38 Acres, More or Less, Located at 328, 330 and 332 Buck Island Road and identified by Beaufort County Tax Map Numbers R610 03 000 0016 0000 (328 and

330 Buck Island Road) and R610 039 000 018C 0000 (332 Buck Island Road). Second and Final Reading - Kevin Icard, Director of Growth Management

For the Following Applications:

1. Consideration of an Amendment to the Town of Bluffton Comprehensive Plan "Blueprint Bluffton" to Amend the Said Properties from the Future Land Use Designation of Suburban Living to Neighborhood Center;

**Motion 1 – Comprehensive Plan**

A motion made by Councilmember Burden; Seconded by Councilmember Hamilton to approve an Amendment to the Town of Bluffton Comprehensive Plan "Blueprint Bluffton" to amend the said properties from the Future Land Use Designation of Suburban Living to Neighborhood Center. Town Council unanimously approved the amendment.

2. Consideration of a Zoning Map Amendment to Rezone the Subject Properties from the Residential General (RG) to the Light Industrial (LI) District.

**Motion 2 – Zoning Map Amendment**

A motion made by Councilmember Burden; Seconded by Mayor Pro-Tempore Wood to approve an Amendment to the Town of Bluffton Official Zoning Map to Rezone the Subject Properties from the Residential General (RG) District to the Light Industrial (LI) District. Town Council unanimously approved the amendment.

**X. FORMAL AGENDA ITEMS**

1. Acceptance of the Presentation of the Town of Bluffton FY 2024 Audit by Mauldin and Jenkins, LLC - Natalie Majorkiewicz, Director of Finance

A representative from Mauldin and Jenkins awarded the Town of Bluffton a clean, unmodified opinion for the Town's FY 2024 Audit and commended the Town for performing above the standards for compliance.

2. Consideration of Accommodations Tax Advisory Committee Funding Recommendations for Quarter Ending September 30, 2024 - Natalie Majorkiewicz, Director of Finance

**A. Farmer's Market of Bluffton Requesting \$55,300**

A motion made by Councilmember Burden; Seconded by Councilmember Frazier to approve funding for the Farmers Market of Bluffton request of \$55,300. Town Council unanimously approved the request.

**B. The New Bluffton Worship Requesting \$28,810**

A motion made by Mayor Pro-Tempore Wood; Seconded by Councilmember Hamilton to approve funding for the New Bluffton Worship for \$25,100 of the \$28,810 request. Town Council unanimously approved the request.

**C. Society of Bluffton Artists Requesting \$27,000**

A motion made by Councilmember Hamilton; Seconded by Councilmember Frazier to approve funding for the Society of Bluffton Artists requesting \$27,000. Town Council unanimously approved the request.

D. Congregation Beth Yam Requesting \$2,980

A motion made by Councilmember Burden; Seconded by Councilmember Frazier to approve funding for the Congregation Beth Yam in the amount of \$2,830 of the initial \$2,980 requests. Town Council unanimously approved the request.

E. Historic Bluffton Foundation Requesting \$40,000

A motion made by Councilmember Burden; Seconded by Councilmember Frazier to approve funding for the Historic Bluffton Foundation in the amount of \$20,000 of the initial \$40,000 request. Town Council unanimously approved the request.

F. May River Theatre Requesting \$42,826

A motion made by Councilmember Burden; Seconded by Councilmember Frazier to approve funding for the May River Theatre in the amount of \$42,826.

Town Council unanimously approved the request.

3. Consideration and Approval of Amendments to the Town of Bluffton Code of Ordinances. Chapter 6 Businesses and Business Regulations Article III – Soliciting and Mobile Vending, Section 6-78, Approvals, fees and taxes, Section 6-83 Fire Safety, Section 6-84 Violations and Penalties. Second and Final Reading - Kevin Icard, Director of Growth Management

A motion made by Mayor Pro-Tempore Wood; Seconded by Councilmember Burden to approve the Ordinance Amending the Town of Bluffton Code of Ordinances, Chapter 6, Businesses and Business Regulations, Article III, Soliciting and Mobile Vending as presented.

Town Council unanimously approved the ordinance.

4. Consideration and Approval of Amendments to the Town of Bluffton Code of Ordinances. Chapter 6 Businesses and Business Regulations Article V – Short-Term Rental Units, Section 6-114 Application, Section 6-120 Violations and Penalties. Second and Final Reading - Kevin Icard, Director of Growth Management

A motion made by Mayor Pro-Tempore Wood; Seconded by Councilmember Burden to approve the Ordinance Amending the Town of Bluffton Code of Ordinances, Chapter 6, Businesses and Business Regulations, Article V, Short-Term Rental Units as presented.

Town Council unanimously approved the ordinance.

5. Approval to Authorize a Construction Contract to Atlantic Asphalt for Pathway Pedestrian Safety Improvements Site Development Project - Phase 2 (Fiscal Impact: \$123,168.97) - Pat Rooney, Capital Improvement Program Manager

A motion made by Councilmember Burden; Seconded by Mayor Pro-Tempore Wood to approve authorizing the Town Manager to enter into a contract with Atlantic Asphalt for the Construction of Phase 2 of the Pathway Pedestrian and Safety Improvements Project for a total fiscal impact of \$123,168.97, which includes a 20% contingency.

Town Council unanimously approved the authorization of the contract.

6. Consideration of an Ordinance Authorizing an Economic Development Incentive Agreement Between the Town of Bluffton and Encompass Health. First Reading – David Nelems, CEO of DRCI

A motion made by Mayor Pro-Tempore Wood; Seconded by Councilmember Burden to approve first reading of an Ordinance Authorizing the Town Manager to enter into an Economic Development Grant Agreement between the Town of Bluffton and Encompass Health for Project Sabal.

Town Council unanimously approved the first reading of the ordinance.

7. Consideration of an Ordinance Authorizing an Economic Development Incentive Agreement Between the Town of Bluffton and CS Instruments USA Inc. First Reading – David Nelems, CEO of DRCI

A motion made by Councilmember Frazier; Seconded by Councilmember Hamilton to approve first reading of an Ordinance Authorizing the Town Manager to enter into an Economic Development Grant Agreement between the Town of Bluffton and CS Instruments USA, Inc.

Town Council unanimously approved the first reading of the ordinance.

#### **XI. CONSENT AGENDA ITEMS**

A motion made by Mayor Pro-Tempore Wood; Seconded by Councilmember Hamilton to approve the Consent Agenda 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. Presentation of the Hilton Head Island Bluffton Chamber of Commerce FY25 Quarterly Report - Ariana Pernice, Hilton Head Island Bluffton Chamber of Commerce
4. Consideration of Adoption of the 2025 Town Council Meeting Schedule and 2025 Quarterly Workshop Meeting Schedule - Marcia Hunter, Town Clerk
5. Consideration of a Proposed Lighting Agreement with Dominion Energy for the Oscar Frazier Park Splash Pad Project (Fiscal Impact: \$7,070.40 over a 10-year term) – Pat Rooney, Capital Improvement Program Manager
6. Consideration of a Resolution Amending the Intergovernmental Agreement Regarding Affordable Housing. – Heather Colin, Assistant Town Manager

#### **XII. EXECUTIVE SESSION**

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

#### **XIV. ADJOURNMENT**

A motion made by Councilmember Hamilton; Seconded by Councilmember Burden to adjourn at 7:18PM.

DRAFT

TOWN COUNCIL

STAFF REPORT  
Growth Management Department



MEETING DATE:	January 14, 2025
PROJECT:	Town of Bluffton Annual Development Agreement Update
PROJECT MANAGER:	Kevin Icard, AICP, Director of Growth Management

**BACKGROUND:** Each year town staff updates the Development Agreement Summaries and Build-Out table to provide an update on the amount of dwelling units and commercial square footage that is constructed and utilized. This information assists staff and citizens to understand the amount of growth that the town has undergone.

Attachment 1 provides the status of the Town of Bluffton’s Development Agreements through December 31, 2024 for the following Planned Unit Development (PUD) communities subject to said Agreements:

- Buckwalter
- Jones Estate
- New Riverside
- Palmetto Bluff
- Schultz Tract
- Village at Verdier

The table (Attachment 1) provides information relating to the total allowed development rights, new construction statistics from January 1, 2024 through December 31, 2024, cumulative construction statistics, utilization of development rights, preserved development rights, and the development rights status in the Town Development Rights Bank. The summary also includes the remaining development rights associated with each community and the estimated percentage built-out as well as the percentage of development rights utilized. Bluffton Village has been removed from the Summary as it has since expired on October 17, 2024. Therefore, the percentages of buildout and utilization of development rights no longer includes its data.

The Development Agreement Summary (Attachment 2) provides an overview of each Development Agreement including acreage, density and any public dedications. Each Planned Unit Development has a summary with a map showing the land area and amendment summaries.



**ATTACHMENTS:**

1. Town of Bluffton Annual Development Agreement Summary Through December 31, 2024; and
2. Development Agreement Summary.



Development Agreement Building Permits vs. Utilized Development Rights Summary  
As Of December 31, 2024

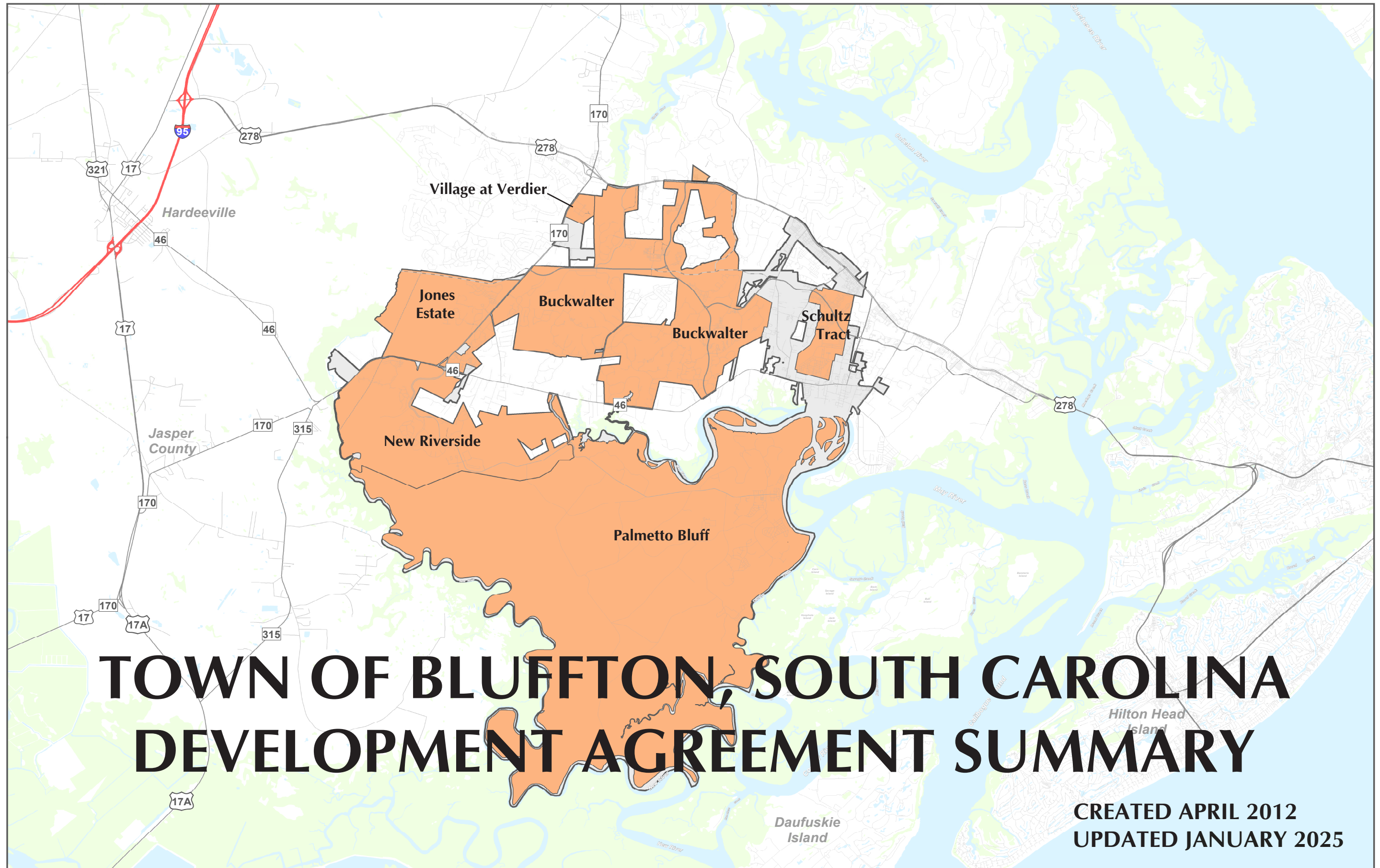
Development Agreement					Government Entity Holdings		New Construction Statistics January 1, 2024 Through December 31, 2024			Cumulative Statistics														
Name	Approval Date	Expiration Date <small>(Including Extensions and 9-Year Tolling Period Per SC Act 297 (2010) &amp; SC Act 112 (2013); Bluffton Village Development Agreement Expired October 17, 2024 and Therefore Removed From This Summary)</small>	Acres	Permitted Development Rights <sup>1</sup>	Purchased by the Beaufort County Rural and Critical Lands Program	Held by the Town of Bluffton in Development Rights Bank	Building Permits	Value of Construction	Certificate of Occupancy	Building Permits Issued	Remaining for Building Permit = <small>(Permitted Development Rights - Building Permits Issued - Purchased by RCLP - Held by the Town of Bluffton)</small>	Build-Out Percentages					Utilized Development Rights		Utilized Development Rights Developed Percentages					
												Development Rights Percentage Built-Out = <small>((Building Permits Issued + Purchased by BCRLB + Held by TOB) / Permitted Development Right)</small>	Development Agreement Percentage Built-Out	Residential All Development Agreements Percentage Built-Out	Non-Residential All Development Agreements Percentage Built-Out	TOTAL All Development Agreements Percentage Built-Out	Utilized <sup>6</sup>	Remaining for Development = <small>(Permitted Development Rights - Utilized - Purchased by RCLP)</small>	Development Rights Percentage Utilized = <small>((Utilized + Purchased by BCRLB + Held by TOB) / Permitted Development Right)</small>	Development Agreement Percentage Utilized	Residential All Development Agreements Percentage Utilized	Non-Residential All Development Agreements Percentage Utilized	TOTAL All Development Agreements Percentage Utilized	
Buckwalter	April 19, 2000	April 18, 2039	6,333	8,792 Residential DU	613 Residential DU <sup>1</sup>	115 Residential DU	27 Residential DU	\$ 15,666,135 Residential DU	184 Residential DU	5,888 Residential DU	2,176 Residential DU	75%	36%				5,832 Residential DU	2,232 Residential DU	75%	36%				
				300 Hotel Units	0 Hotel Units	0 Hotel Units	0 Hotel Units	\$ - Hotel Units	0 Hotel Units	0 Hotel Units	300 Hotel Units	0%					0 Hotel Units	300 Hotel Units	0%					
				856.641 Acres Commercial	31.18 Acres Commercial <sup>2</sup>	1.21 Acres Commercial	27,327 SF Commercial	\$ 6,045,008 Commercial	3 Commercial	811,589 SF Commercial	579 Acres Commercial	32%					245 Acres Commercial	579 Acres Commercial	32%					
Jones Estate	June 21, 2000	June 20, 2039	1,885	2,516 Residential DU	0 Residential DU	0 Residential DU	91 Residential DU	\$ 40,028,426 Residential DU	108 Residential DU	2,103 Residential DU	413 Residential DU	84%	68%				2,516 Residential DU	0 Residential DU	100%	76%				
				131 Acres Commercial	0 Acres Commercial	0 Acres Commercial	105,880 SF Commercial	\$ 13,511,347 Commercial	1 Commercial	325,253 SF Commercial	64 Acres Commercial	51%					67 Acres Commercial	64 Acres Commercial	51%					
New Riverside	August 24, 2004	N/A	4,006	3,651 Residential DU <sup>2</sup>	0 Residential DU	0 Residential DU	130 Residential DU	\$ 45,418,298 Residential DU	318 Residential DU	2,927 Residential DU	724 Residential DU <sup>2</sup>	80%	62%	78%	32%	52%	3,329 Residential DU	322 Residential DU <sup>2</sup>	91%	66%	84%	32%	55%	
				190 Acres Commercial	0 Acres Commercial	0 Acres Commercial	48,775 SF Commercial	\$ 12,542,167 Commercial	4 Commercial	26,125 SF Commercial	177 Acres Commercial	7%					13 Acres Commercial	177 Acres Commercial	7%					
				200 Acres Business Park <sup>4</sup>	200 Acres Business Park <sup>3</sup>	0 Acres Business Park	0 SF Business Park	\$ - Business Park	0 Business Park	0 SF Business Park	0 Acres Business Park <sup>4</sup>	100%					0 Acres Business Park	0 Acres Business Park <sup>4</sup>	100%					
Palmetto Bluff	November 23, 1998	November 22, 2057	19,217	4,000 Residential DU <sup>2,4</sup>	0 Residential DU	0 Residential DU	97 Residential DU	\$ 106,827,698 Residential DU	189 Residential DU	1,485 Residential DU	2,515 Residential DU <sup>2,4</sup>	37%	22%				1,844 Residential DU <sup>2,4</sup>	2,156 Residential DU <sup>2,4</sup>	46%	28%				
				180 Acres Commercial	0 Acres Commercial	0 Acres Commercial	0 SF Commercial	\$ - Commercial	0 Commercial	131,740 SF Commercial	166 Acres Commercial	8%					16 Acres Commercial	164 Acres Commercial	9%					
Schults Tract	November 23, 1998	November 22, 2057	620	1,263 Residential DU <sup>5</sup>	187 Residential DU <sup>3,5</sup>	189 Residential DU	0 Residential DU	\$ - Residential DU	0 Residential DU	821 Residential DU	66 Residential DU <sup>5</sup>	95%	84%				821 Residential DU	66 Residential DU <sup>5</sup>	95%	84%				
				230 Acres Commercial	0 Acres Commercial	0 Acres Commercial	51,371 SF Commercial	\$ 9,486,667 Commercial	2 Commercial	954,222 SF Commercial	64 Acres Commercial	72%					166 Acres Commercial	67 Acres Commercial	72%					
Village at Verdier	December 18, 2002	December 17, 2026	126	458 Residential DU	0 Residential DU	0 Residential DU	0 Residential DU	\$ - Residential DU	0 Residential DU	449 Residential DU	9 Residential DU	98%	39%				449 Residential DU	9 Residential DU	98%	39%				
				296,000 SF Commercial	0 SF Commercial	0 SF Commercial	0 SF Commercial	\$ - Commercial	0 Commercial	54,353 SF Commercial	241,647 SF Commercial	18%					54,353 SF Commercial	241,647 SF Commercial	18%					
				30,000 SF Civic	0 SF Civic	0 SF Civic	0 SF Civic	\$ - Civic	0 Civic	0 SF Civic	30,000 SF Civic	0%					0 SF Civic	30,000 SF Civic	0%					
TOTALS			32,187	20,680 Residential DU	800 Residential DU	304 Residential DU	345 Residential DU	\$ 207,940,556 Residential DU	799 Residential DU	13,673 Residential DU	6,207 Residential DU						14,791 Residential DU	4,785 Residential DU						
	300 Hotel Units	0 Hotel Units		0 Hotel Units	0 Hotel Units	\$ 0 Hotel Units	0 Hotel Units	0 Hotel Units	300 Hotel Units						0 Hotel Units	300 Hotel Units								
	1,588 Acres Commercial	31.18 Acres Commercial		1.21 Acres Commercial	233,353 SF Commercial	\$ 41,585,189 Commercial	10 Commercial	2,303,282 SF Commercial	1,050 Acres Commercial						509 Acres Commercial	1,049 Acres Commercial								
	200 Acres Business Park	200 Acres Business Park		0 SF Business Park	0 SF Business Park	\$ 0 Business Park	0 Business Park	0 SF Business Park	0 Acres Business Park						0 Acres Business Park	0 Acres Business Park								
	296,000 SF Commercial	0 SF Commercial		0 SF Commercial	0 SF Civic	\$ 0 Civic	0 Civic	0 SF Civic	241,647 SF Commercial						54,353 SF Commercial	241,647 SF Commercial								
				30,000 SF Civic	0 SF Civic	0 SF Civic				30,000 SF Civic						0 SF Civic	30,000 SF Civic							



**Development Agreement Building Permits vs. Utilized Development Rights Summary  
As Of December 31, 2024**

**NOTES:**

- <sup>1</sup> Community amenities such as clubhouses, equestrian facilities, pro shops, etc. as well as civic, institutional, church, and assisted living facilities with a Certificate of Need do not count against residential or commercial development rights.
- <sup>2</sup> New Riverside, LLC deposited 1,300 residential dwelling units on January 16, 2013, and may deposit an additional 764 residential dwelling units at its own discretion at a later date, into the Town's Development Rights Bank for future allocation outside of the critical areas of the May River Watershed Headwaters Restricted Area. Of the 1,300 residential dwelling units deposited, 1,080 may be withdrawn and transferred to the Palmetto Bluff Concept Land Use Plan which would increase Palmetto Bluff's allocated residential development rights from 2,920 to 4,000 residential dwelling units. The withdrawal and transfer to Palmetto Bluff occurred in December 2016.
- <sup>3</sup> These development rights were sold to Beaufort County as part of their Rural and Critical Lands Program. Therefore, it is most likely that these development rights will be preserved and reduce the remaining available.
- <sup>4</sup> The Palmetto Bluff Concept Plan provides that inns, hotels, bed & breakfasts, and associated ancillary uses such as conference centers, spas, restaurants, etc. count against residential development rights at a ratio of 1 room = 1/2 residential dwelling unit.
- <sup>5</sup> The Schults Tract Development Agreement initially established development rights for 1,600 residential dwelling units. The available residential development rights were reduced through 1) The extinguishment of 187 residential dwelling units as part of the transaction for Town of Bluffton and Beaufort County's co-purchase of Tract B-11; and 2) The transfer of 337 residential dwelling units to the Buckwalter Development Agreement, specifically Buckwalter Place, through a Transfer of Development Rights Permit.
- <sup>6</sup> Residential development rights are considered utilized upon the platting of a new single family lot or upon the issuance of a building permit for structures with multiple dwelling units such as condominiums, multi-family/apartment complexes, hotels, inns, bed & breakfasts, or dormitories. Commercial development rights are considered utilized upon the issuance of a building permit for a commercial structure.
- <sup>7</sup> These development rights are owned by the Town of Bluffton.



Development Agreement Overall Acreage, Density, and Dedication Summary

Development Agreement	Acres	Density		Public Dedications
		Residential Dwelling Units	Commercial/ Business Park/ Non-Residential/ Civic/ Hotel	
Buckwalter	6,333 Acres	8,792 Dwelling Units	<ul style="list-style-type: none"><li>• 856.641 Acres Commercial / Neighborhood Commercial</li><li>• 300 Hotel Units</li></ul>	<div>1) 29.1 acres for Municipal Use</div> <div>2) 3.77 acres for Municipal Affordable Housing Site</div> <div>3) 142.92 acres for Buckwalter Regional Park</div> <div>4) 155.49 acres of Right-of-Way for Buckwalter Pkwy, Bluffton Pkwy, Hampton Pkwy &amp; McCracken School Loop Rd</div> <div>5) 50’ Leisure Trail Easement adjacent to Buckwalter Pkwy and Bluffton Pkwy</div> <div>6) 120’ Right-of-Way for Future Hampton Pkwy</div> <div>7) 80’ Right-of-Way for Future Bluffton Pkwy Phase 5B</div> <div>8) 80’ Right-of-Way for Future North/South Connector Road from US 278 to Bluffton Pkwy Phase 5B</div>
Jones Estate	1,885 Acres	2,516 Dwelling Units	<ul style="list-style-type: none"><li>• 104 Acres Commercial / Neighborhood Commercial</li></ul>	<div>1) 102.67 acres for Linear Park and Trailhead Park</div> <div>2) 3-5 acres for Fire, Police or Emergency Service Site</div> <div>3) 25 acres for Public Elementary School Site</div> <div>4) 38 acres of Right-of-Way for SC Highway 170/46 Roundabout and SC Highway 170 Improvements</div> <div>5) 35 Foot Leisure Trail Easement adjacent to SC Highway 46 and SC Highway 170</div> <div>6) 120 Foot Right-of-Way for Future Bluffton Pkwy Westward Expansion</div>
Palmetto Bluff	19,217 Acres	4,000 Dwelling Units	<ul style="list-style-type: none"><li>• 180 Acres Commercial</li></ul>	<div>1) 43.84 acres for Jones Tract Park</div> <div>2) Two 5 acre Parcels for Fire, Police, or Emergency Service Sites</div> <div>3) 6 acre Donation for the Construction of a Stormwater BMP Pilot Project</div>
Schultz Tract	620 Acres	1,263 Dwelling Units	<ul style="list-style-type: none"><li>• 30 Acres Commercial</li><li>• 200 Acres Business Park</li></ul>	<div>1) 25 acres for Oscar Fraser Park</div> <div>2) 100 acres for Nature Preserve</div> <div>3) 35.212 acres of Right-of-Way for Bluffton Pkwy, Sheridan Park Extension, Pin Oak St, and Red Cedar St</div>
Village at Verdier	125.521 Acres	458 Dwelling Units	<ul style="list-style-type: none"><li>• 296,000 Square Feet Non-Residential</li><li>• 30,000 Square Feet Civic</li></ul>	<div>1) 1.5 acres for Civic Use</div> <div>2) 2.99 acres of Right-of-Way for SC Highway 170 Improvements</div> <div>3) 10’ Easement Adjacent to SC Highway 170 for Leisure Trail</div> <div>4) Non-Vehicular Public Access Easement to Okatie Regional Park</div>
New Riverside	4,006 Acres	3,651 Dwelling Units	<ul style="list-style-type: none"><li>• 190 Acres Commercial</li><li>• 200 Acres Business Park</li></ul>	<div>1) See Jones Estate Development Agreement for Public Dedications</div> <div>2) See Palmetto Bluff Development Agreement for Public Dedications</div>
TOTALS	32,187 Acres	20,680 Dwelling Units	<ul style="list-style-type: none"><li>• 1,760 Acres Commercial/ Business Park</li><li>• 296,000 Square Feet Commercial/ Non-Residential</li><li>• 300 Hotel Units</li><li>• 30,000 Square Feet Civic</li></ul>	



# Buckwalter

## Development Agreement Summary

**Initiating Town Ordinance: 2000-03**

**Execution and Anniversary Date:** April 19, 2000

**Term:** Twenty years with option for two five-year extensions plus a nine-year tolling period (per SC Act No. 297, 2010 & SC Act No. 112, 2013) for a total term of thirty-nine (39) years

**Expiration Date:** April 18, 2039

**Acreage:** 6,333 acres

### Density:

- 8,792 Dwelling Units
- 856.641 acres Commercial/ Neighborhood Commercial
- 300 Hotel Units

### Public Dedications:

- 29.1 acres for Municipal Use
- 3.77 acres for Municipal Affordable Housing Site
- 142.92 acres for Buckwalter Regional Park
- 155.49 acres of Right-of-Way for Buckwalter Parkway, Bluffton Parkway, Hampton Parkway, and McCracken School Loop Road
- 50 Foot Leisure Trail Easement adjacent to Buckwalter Parkway and Bluffton Parkway
- 120 Foot Right-of-Way for Future Hampton Parkway
- 80 Foot Right-of-Way for Future Bluffton Parkway Phase 5B
- 80 Foot Right-of-Way for Future North/South Connector Road from US 278 to Bluffton Parkway Phase 5B

### Amendment Summary:

**First Amendment:** Executed on June 21, 2002 and enabled by Ordinance 2002-07

**Second Amendment:** Executed on February 4, 2003 and enabled by Ordinance 2002-16

**Third Amendment:** Executed on October 10, 2005 and enabled by Ordinance 2005-08

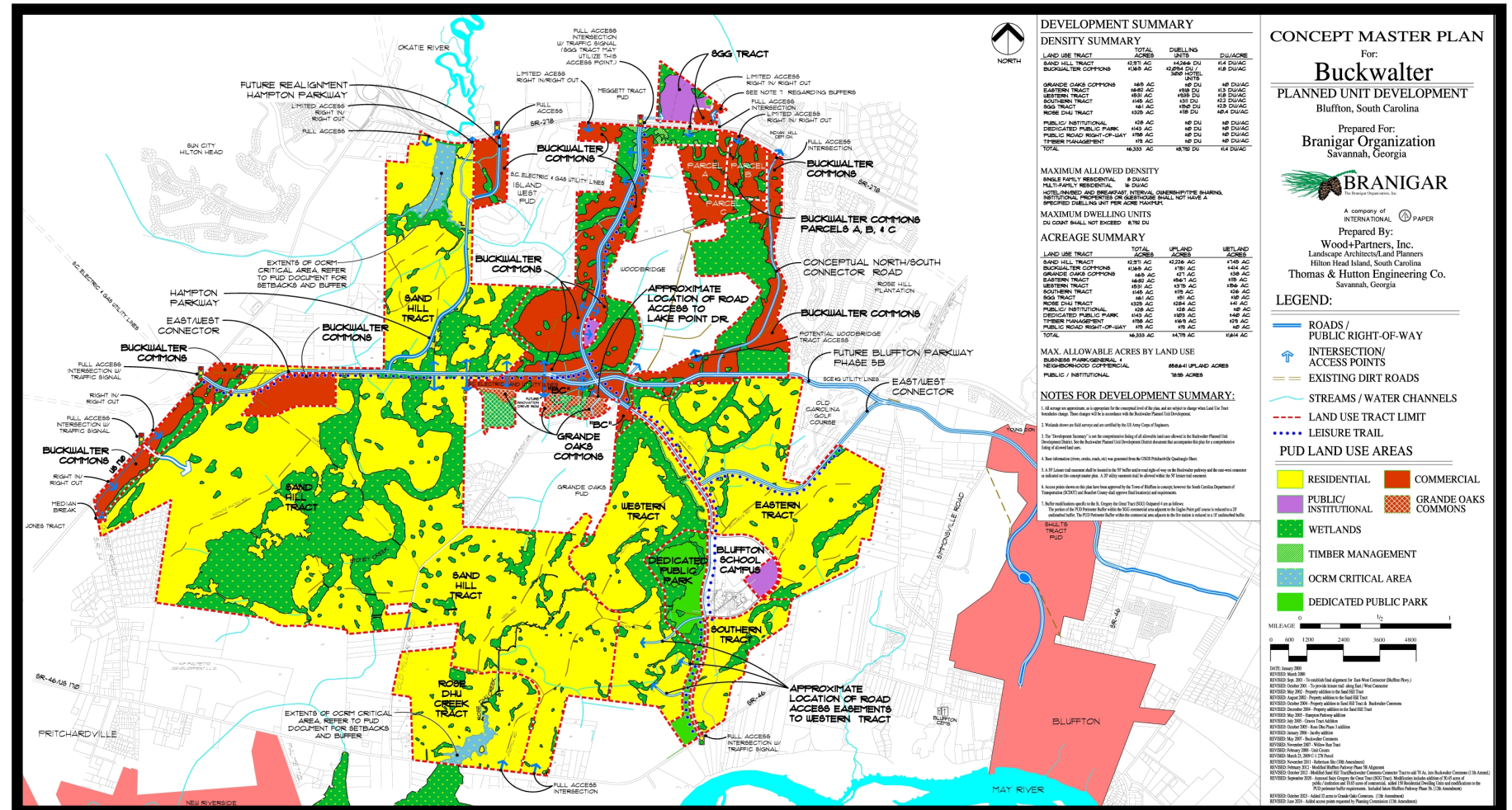
**Fourth Amendment:** Executed on October 10, 2005 by an Administrative Amendment

**Fifth Amendment:** Executed on November 2, 2005 and enabled by Ordinance 2005-16

**Sixth Amendment:** Executed on May 10, 2006 and enabled by Ordinance 2006-10

**Seventh Amendment:** Executed on January 7, 2008 and enabled by Ordinance 2007-10

**Eighth Amendment:** Executed on November 6, 2007 and enabled by Transfer of Develo



**Ninth Amendment:** Executed on February 25, 2008 and enabled by Ordinance 2008-02

**Tenth Amendment:** Executed on February 10, 2012 and enabled by Ordinance 2011-09

**Eleventh Amendment:** Executed on April 10, 2013 and enabled by Ordinance 2012-13

**Twelfth Amendment:** Executed June 14, 2022 and enabled by Ordinance 2021-19

**Thirteenth Amendment:** Approved November 12, 2024

**CREATED APRIL 2012**  
**UPDATED JANUARY 2025**

# Jones Estate

## Development Agreement Summary

**Initiating Town Ordinance:** 2000-09

**Execution and Anniversary Date:** June 21, 2000

**Term:** Twenty years with option for two five-year extensions plus a nine-year tolling period (per SC Act No. 297, 2010 & SC Act No. 112, 2013) for a total term of thirty-nine (39) years

**Expiration Date:** June 20, 2039

**Acreage:** 1,885 acres

**Density:**

- 2,516 Dwelling Units
- 130.5 acres Commercial/ Neighborhood Commercial

**Public Dedications:**

- 102.67 acres for Linear Park and Trailhead Park
- 3-5 acres for Fire, Police or Emergency Service Site
- 25 acres for Public Elementary School Site
- 38 acres of Right-of-Way for SC Highway 170/46 Roundabout and SC Highway 170 Improvements
- 35 Foot Leisure Trail Easement adjacent to SC Highway 46 and SC Highway 170
- 120 Foot Right-of-Way for Future Bluffton Parkway Westward Expansion

**Amendment Summary:**

**First Amendment:** Executed August 24, 2004 and enabled by Ordinance 2004-09

**Second Amendment:** Executed October 18, 2004 and enabled by Ordinance 2004-10

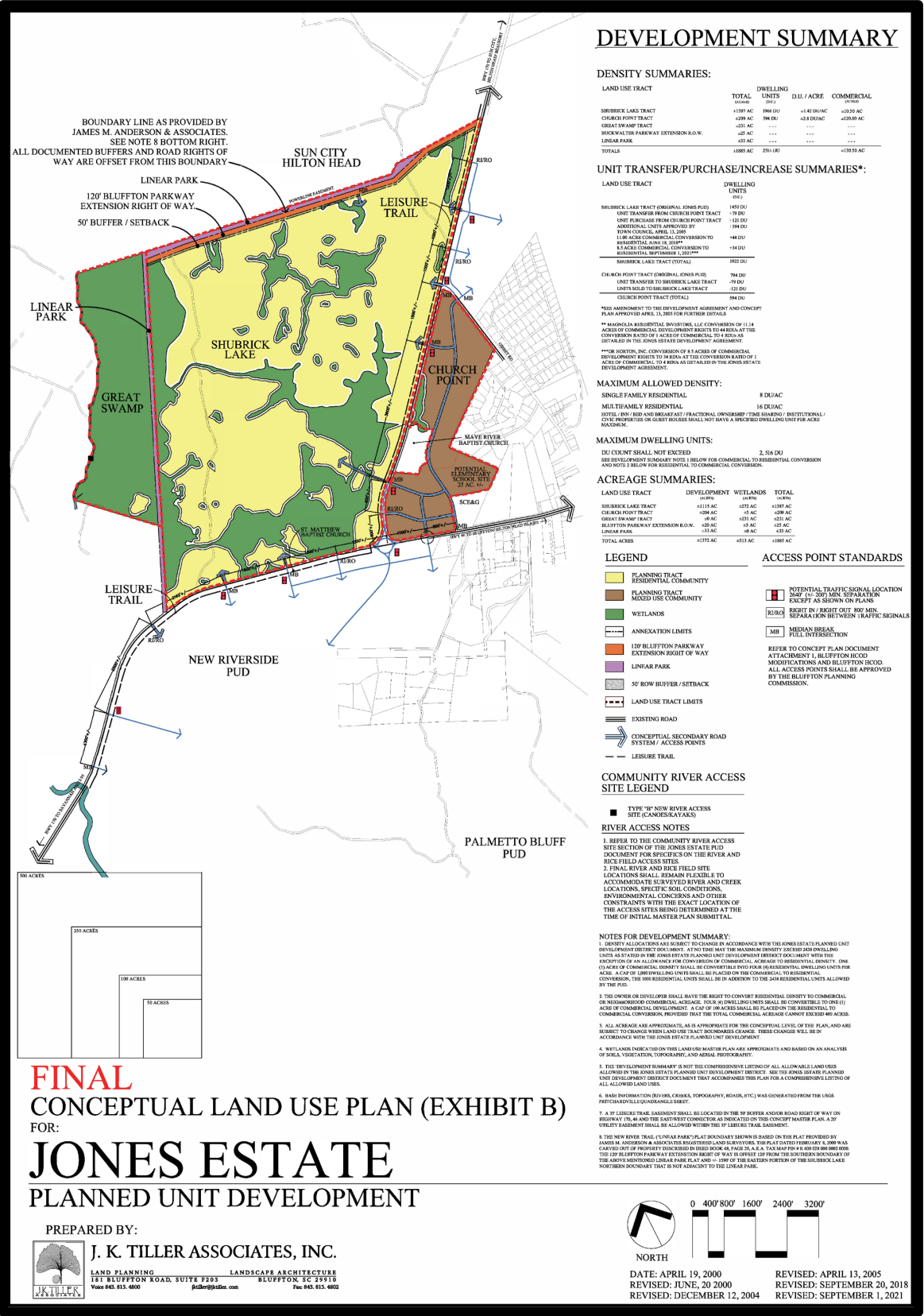
**Third Amendment:** Executed July 20, 2005 and enabled by Ordinance 2005-10

**Fourth Amendment (Minor):** Executed October 23, 2018 for a by-right conversion of 11 acres of commercial development rights to 44 residential dwelling units

**Fifth Amendment (Minor):** Executed January, 2022 for a by-right conversion of 8.5 acres of commercial development rights to 34 residential dwelling units

**Additional Reference:**

New Riverside



CREATED APRIL 2012  
UPDATED JANUARY 2022



# Palmetto Bluff

## Development Agreement Summary

**Initiating Town Ordinance:** 1998-02

**Execution and Anniversary Date:** November 23, 1998

**Term:** Thirty-five years with option for three five-year extensions plus a nine-year tolling period (per SC Act No. 297, 2010 & SC Act No. 112, 2013) for a total term of fifty-nine (59) years

**Expiration Date:** November 22, 2057

**Acreage:** 19,217 acres

**Density:**

- 4,000 Dwelling Units
- 180 acres Commercial

**Public Dedications:**

- 43.84 acres for Jones Tract Park
- Two 5 acre Parcels for Fire, Police, or Emergency Service Sites
- 6 acres for the Construction of a Stormwater BMP Pilot Project

**Amendment Summary:**

**First Amendment:** Executed June 10, 2004 and enabled by Ordinance 2004-10

**Second Amendment:** Executed March 9, 2005 and enabled by Ordinance 2005-06

**Third Amendment:** Executed December 16, 2009 as an Administrative Amendment

**First Amendment to the Second Amendment:** Executed April 25, 2012 as an Administrative Amendment

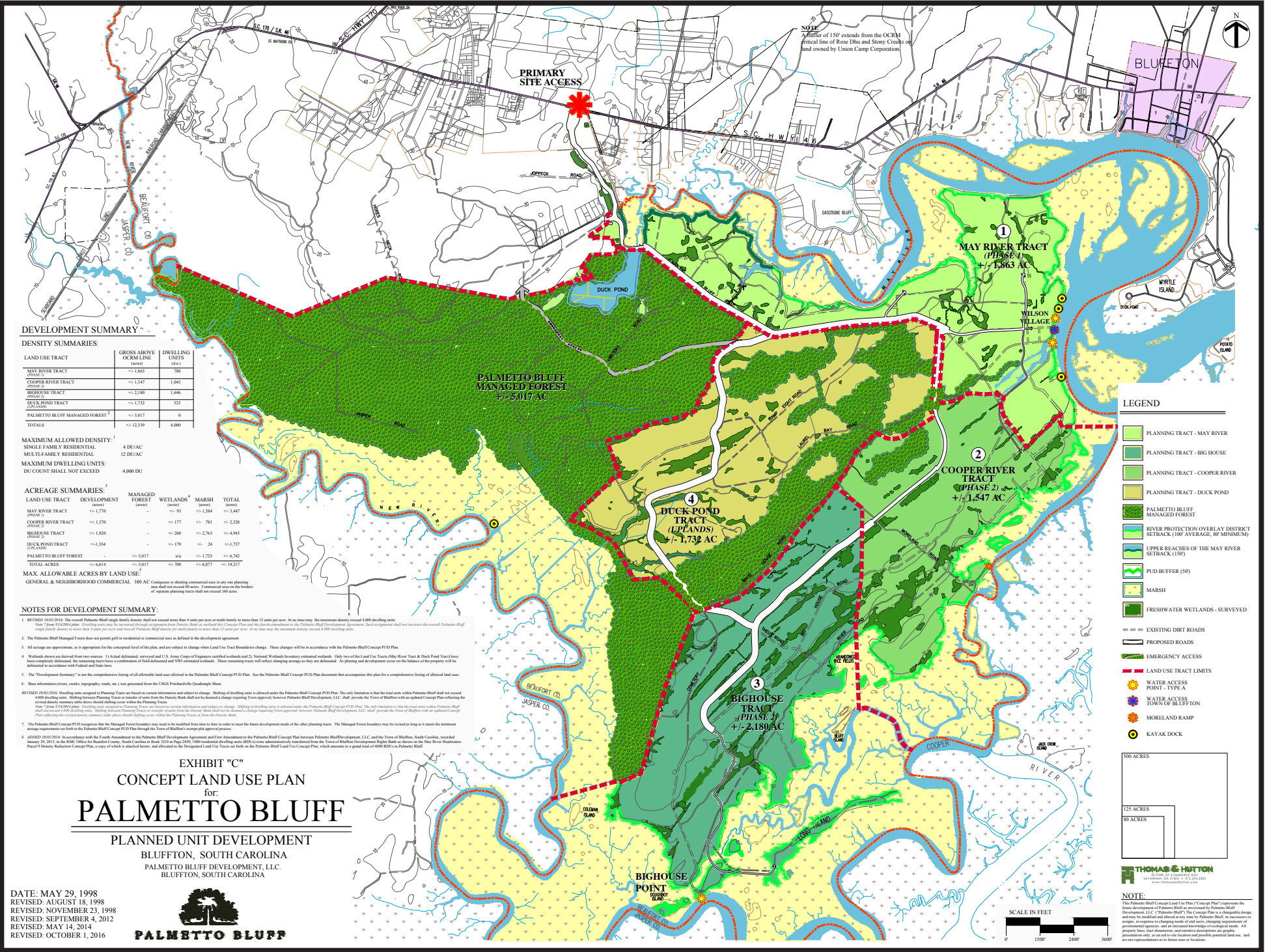
**Fourth Amendment:** Executed January 16, 2013 and Enabled by Ordinance 2012-16

**Addendum:** Executed December 5, 2016 as an Administrative Amendment

**Fifth Amendment:** Approved December 13, 2022 and enabled by Ordinance

**Additional Reference:**

New Riverside



CREATED APRIL 2012  
UPDATED DECEMBER 2022



# Schultz Tract

## Development Agreement Summary

### Initiating Town Ordinance: 1998-02

**Execution and Anniversary Date:** November 23, 1998

**Term:** Thirty-five years with option for three five-year extensions plus a nine-year tolling period (per SC Act No. 297, 2010 & SC Act No. 112, 2013) for a total term of fifty-nine (59) years

**Expiration Date:** November 22, 2057

**Acreage:** 620 acres

**Density:**

- 1,263 Dwelling Units
- 30 acres Commercial
- 200 acres Business Park

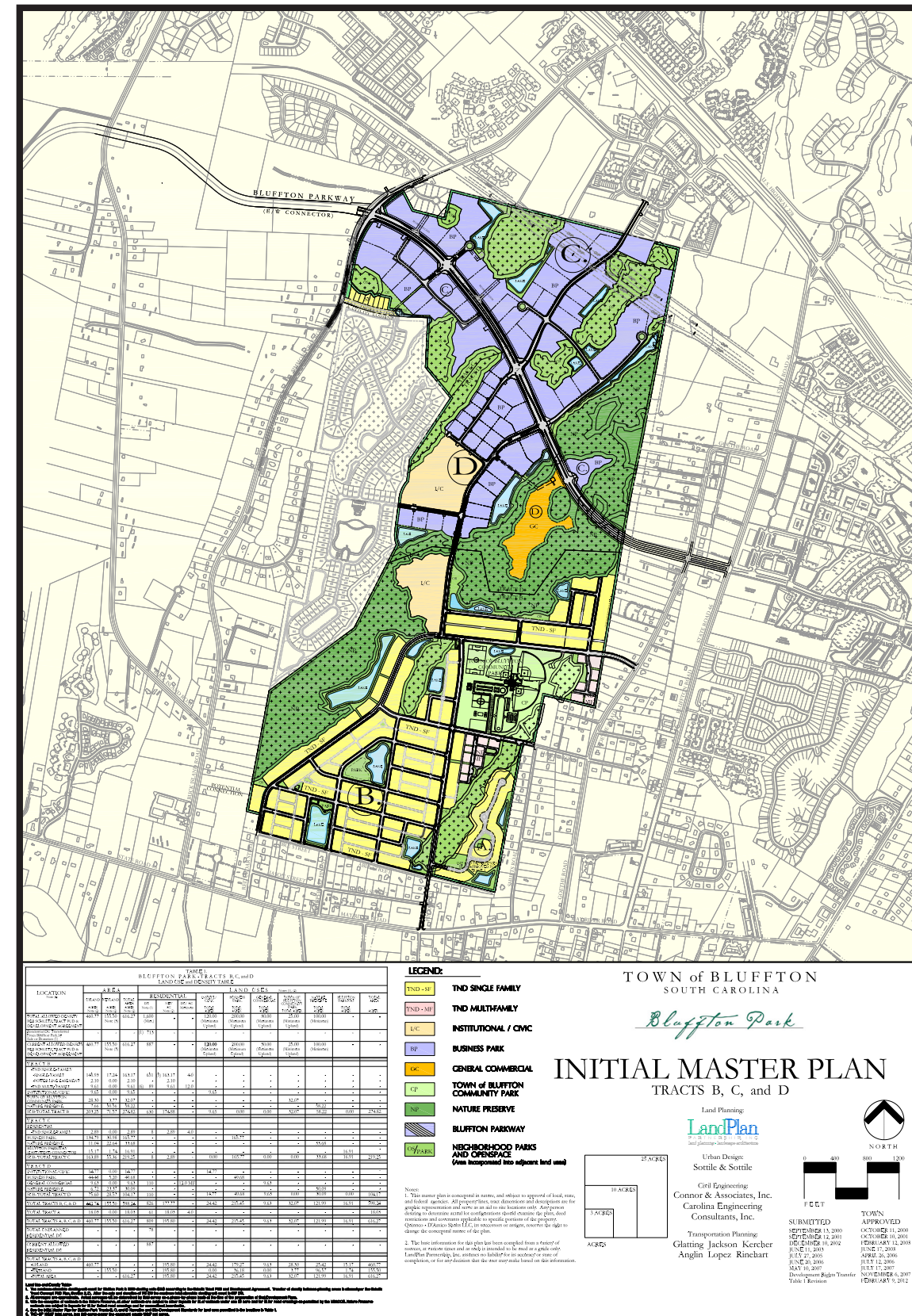
### Public Dedications:

- 25 acres for Oscar Frazier Park
- 100 acres for a Nature Preserve
- 35.212 acres of Right-of-Way for Bluffton Parkway, Sheridan Park Extension, Pin Oak Street, and Red Cedar Street

### Amendment Summary:

None

**Note:** 324 Residential Dwelling Units Transferred to the Buckwalter Development Agreement per Transfer of Development Rights Permit No. TD.07.10.001 on November 6, 2007.



CREATED APRIL 2012  
UPDATED JUNE 2019

# Village at Verdier

## Development Agreement Summary

**Initiating Town Ordinance:** 2002-12

**Execution and Anniversary Date:** December 18, 2002

**Term:** Five years with two five-year automatic extensions plus a nine-year tolling period (per SC Act No. 297, 2010 & SC Act No. 112, 2013) for a total term of twenty-four (24) years

**Expiration Date:** December 17, 2026

**Acreage:** 125.512 acres

### Density:

- 458 Dwelling Units
- 296,000 square feet Non-Residential
- 30,000 square feet Civic

### Public Dedications:

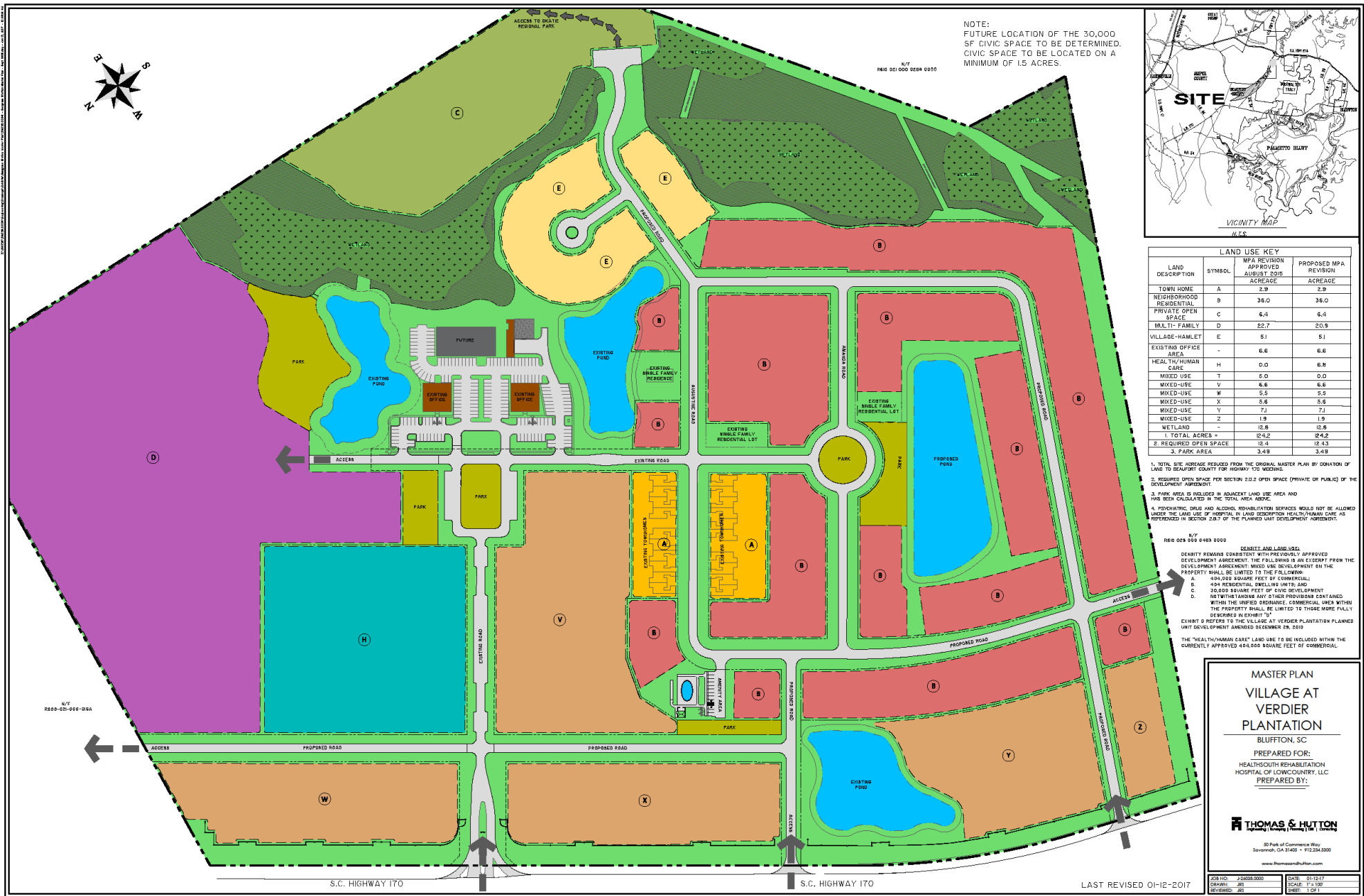
- 1.5 acres for Civic Use
- 2.99 acres of Right-of-Way for SC Highway 170 Improvements
- 10 Foot Easement Adjacent to SC Highway 170 for Leisure Trail
- Non-Vehicular Public Access Easement to Okatie Regional Park

### Amendment Summary:

**First Amendment:** Executed on May 23, 2011 and enabled by Ordinance 2011-05

**Second Amendment:** Ratified December 12, 2018 and enabled by Ordinance 2017-08

**Note:** By-Right Conversion of 108,000 Square Feet of Non-Residential to 54 Residential Dwelling Units Occurred on November 29, 2018



CREATED APRIL 2012  
UPDATED JUNE 2019



# New Riverside

## Concept Plan Summary

## Initiating Town Ordinances:

## Jones Estate Development Agreement First Amendment:

Executed on August 24, 2004 and enabled by Ordinance  
2004-09

## Palmetto Bluff Development Agreement First Amendment:

Executed on August 24, 2004 and enabled by Ordinance  
2004-09

**Total Acreage:** 4,006 acres

**Total Density:**

- 190 acres Commercial
- 200 acres Business Park

**Note:** Addendum to the New Riverside PUD Concept Plan Development Agreement, December 5, 2016

### Applicable Development Agreement Summary:

### Jones Estate:

**Acreage:** 2,316 acres (Former Garvey Hall and Pritchard Station Tracts)

**Density:**

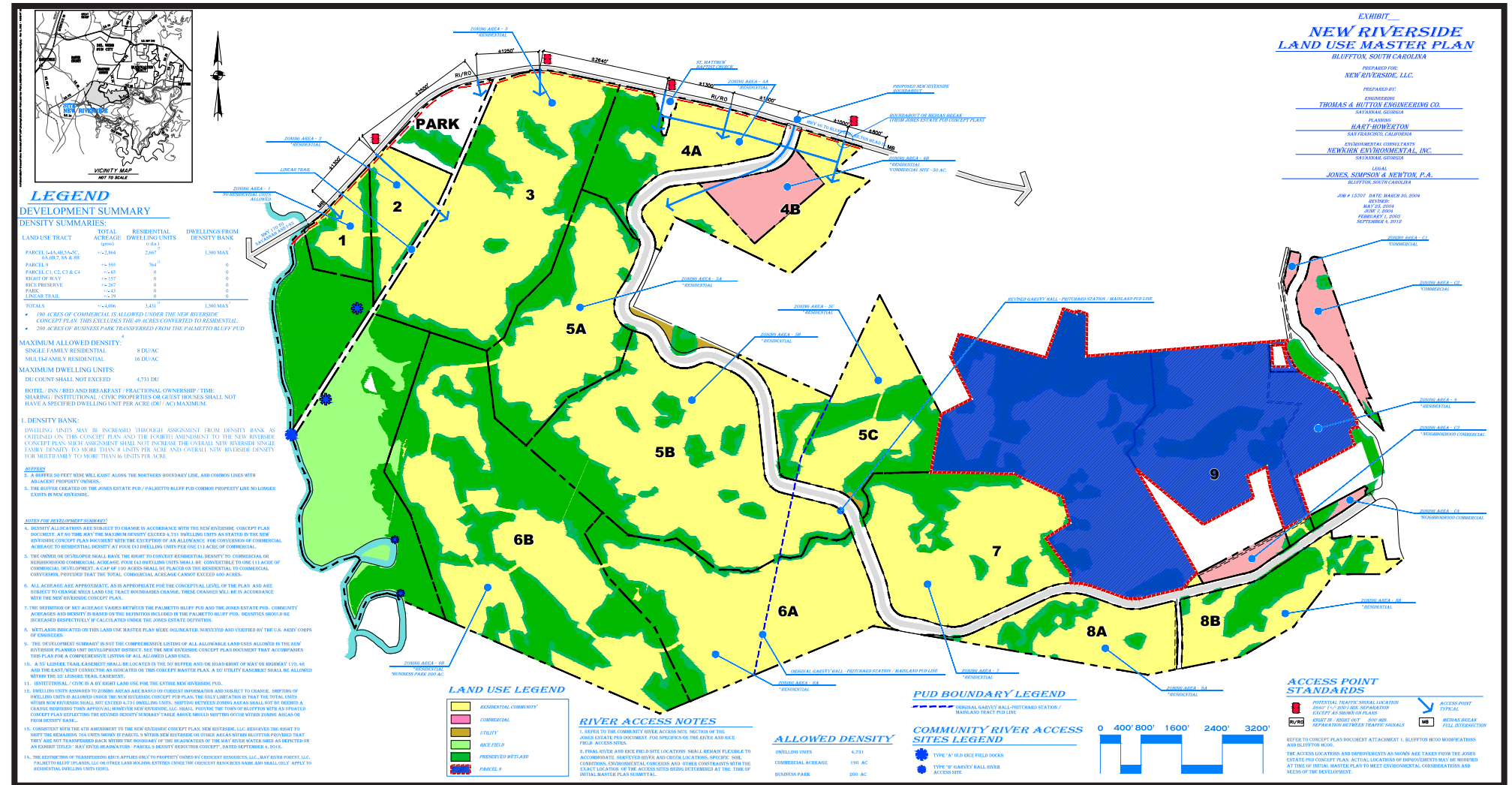
- 2,731 Dwelling Units
- 70 acres Commercial

### Palmetto Bluff:

**Acreage:** 1,490 acres (Former Portions of the Mainland and Managed Forest Tracts)

**Density:**

- 2,000 Dwelling Units
- 120 acres Commercial
- 200 acres Business Park



### Amendment Summary:

**First Amendment:** Executed on March 9, 2005 and Enabled by Ordinance 2005-07

**Second Amendment:** Executed on June 8, 2005 and Enabled by Ordinance 2005-11

**Third Amendment (Minor):** Executed on December 16, 2009

**First Amendment to the First Amendment (Minor):** Executed on April 25, 2012

**First Amendment to the Second Amendment (Minor):** Executed on April 25, 2012

**Fourth Amendment:** Executed on January 16, 2013 and Enabled by Ordinance 2012-15

**Addendum:** Executed on November 10, 2016

**Fifth Amendment (Minor):** Executed December 18, 2018

**Note:** As contemplated by the Fourth Amendment, 1,080 Dwelling Units from the New Riverside Concept Plan which Were Deposited in the Town of Bluffton Development Rights Bank were Withdrawn and Transferred Back into the Palmetto Bluff Concept Plan on November 10, 2016

**CREATED APRIL 2012**  
**UPDATED JUNE 2019**

**STAFF REPORT**  
**Executive Department**

<b>MEETING DATE:</b>	January 14, 2025
<b>PROJECT:</b>	Consideration of An Ordinance Authorizing an Economic Development Incentive Agreement between the Town of Bluffton and Encompass Health Corporation (ECH) for facility expansion – Second and Final Reading
<b>PROJECT MANAGER:</b>	David Nelems, DRCI CEO

**REQUEST:**

Request for Town Council to first reading of an ordinance approving the execution and delivery of an economic development agreement Encompass Health Corporation (ECH).

**BACKGROUND:**

The laws or Constitution of the State of South Carolina, 1895, as amended, empowers towns to enact ordinances related to the expenditure of public funds for public purposes and necessary for the Town to levy certain taxes and fees.

Town residential development has grown exponentially over the past decade. Commercial development has lagged the residential growth. Certain areas of the Town of Bluffton, notably west of Buckwalter parkway, are experiencing a void of commercial development in certain critical service industries. There also remains a lack of affordable housing to accommodate the demand for a diverse local workforce.

In September of 2023 the Bluffton Town Council adopted an Ordinance establishing an economic development incentives plan:

- (i) To promote the redevelopment of existing buildings and infill development within the Incentive Areas;
- (ii) To support the establishment of the categories of new businesses that the Council determines will significantly increase the overall commercial activity within the Town, provide the Town's residents with sufficient options within the Town rather than having to travel elsewhere; encourage tourists and those who reside in surrounding communities to make use of businesses within the Town; and increase property values within the Town as a whole; and
- (iii) To develop the Incentive Areas into commercial spaces that match the Town's sense of place and contributes to the Council's overall priorities established within its Comprehensive and Strategic Plans; and
- (iv) To support the development of affordable housing to encourage relocation of professionals working in one of the professions supported by the incentivized developments.

January 14, 2025

Page 2

The intended use of the development must be for one or more of the following business purposes:

- (i) healthcare, dental, home health, pharmaceutical retail, and similar ancillary uses;
- (ii) childcare services;
- (iii) affordable housing developments (separately or part of a larger project);
- (iv) mixed use commercial and similar flex-use space;
- (v) corporate headquarters; and
- (vi) other uses, as may be determined by the Council, that are consistent with the Goals, and the Plans.

## DISCUSSION:

DRCI received a grant request from Shawn Patzkowsky, with Encompass Health Corporation (ECH). ECH owns and operates an existing 38-bed inpatient physical rehabilitation facility located at 107 Seagrass Station Road in Bluffton.

The proposed project is an addition of 12-beds to the Bluffton, LLC facility (increasing to 50-beds total), expansion of the existing therapy gym, addition of a dialysis suite and creation of additional parking. The additional private rooms will be in a one-story, approximately 8,250 square foot addition, which will be constructed on the southeast side of the hospital campus. This addition will also include a day room, a multipurpose room, and other support spaces. The gym will be expanded by approximately 900 square feet. The four-bay dialysis suite will be in approximately 900 square feet of additional space adjacent to the existing wing of patient beds. The additional parking will be established through a reconfiguration of the parking area which will add 56 parking spaces to the hospital campus. The expansion project will include a total of approximately 10,050 square feet of new space

The total investment for the project is \$11,300,000. It is expected to create 10 new jobs by the end of the first year after completion and a total of up to 30 new jobs within five years. Average wages for the FT jobs added for this project is completed to be \$73,000 per year, working up to an average of \$82,000 per year by year five.

Construction is expected to begin in the fourth quarter of 2025 and is expected to be completed in the third quarter of 2026.

The ordinance allows for grant awards equal to; up to 50% of all permitting fees, up to 100% of BJWSA capacity fees and up to 50% of business license fees for up to five years. The Council has additional discretion to grant additional grant amount if deemed necessary to advance the goals of the ordinance.

Staff have developed the following guide for determining eligible grant amounts based on the significance of qualifying developments.

January 14, 2025

Page 3

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)

Based on the size of the ECH proposed developments, the significant investment and potential new jobs, staff recommends the following grant percentages. It is recommended that ECH receive an economic development incentive grant equal to 50% of all town permitting and development fees, 100% of their BJWSA capacity fees and 50% of business license fees as it relates to the portion of the project dedicated for incentive eligible uses.

The estimated fees related to the ECH development and estimated grant Amounts are as follows:

Fee	Total	Year 1	Year 2	Year 3	Year 4	Year 5
Building Permit Fees	\$ 80,255	\$ 40,128				
Development Agreement Fees	10,500	5,250				
Stormwater Fees	3,000	1,500				
BJWSA Capacity Fee	40,000	40,000				
Business License Fee	3,817	1,909	1,909	1,909	1,909	1,909
	<b>\$ 137,572</b>	<b>\$ 88,786</b>	<b>\$ 1,909</b>	<b>\$ 1,909</b>	<b>\$ 1,909</b>	<b>\$ 1,909</b>
			<b>Estimated Total 5 year Benefit</b>			<b>\$ 96,420</b>

The estimated benefit and net revenue to the Town over 5 years for the Raider Drive development are as follows:

Bluffton Taxes / Fees Estimate (5 Year Total)	Amount
Initial Building & Development Fees	\$ 93,755
Property Taxes	60,000
Business License Fees	19,086
Total Taxes & Fees	\$ 172,841
Five Year Grant Total	\$ 96,420
Net Revenue (Initial 5 Years)	\$ 76,420

**NEXT STEPS:** The Town Council may approve the ordinance as submitted, approve with amendments, or deny approval of the ordinance.

**ATTACHMENTS:**

- 1. Ordinance
- 2. Grant Request Letter
- 3. Project Profile Worksheet
- 4. Site Plan
- 5. Building Rendering
- 6. Motion

**AN ORDINANCE OF THE TOWN OF BLUFFTON, SOUTH CAROLINA,  
APPROVING THE EXECUTION AND DELIVERY OF A DEVELOPMENT  
AGREEMENT WITH ENCOMPASS HEALTH CORPORATION, INC.**

**WHEREAS**, South Carolina law authorizes municipalities to take actions not inconsistent with the Constitution and general laws of the State, regarding any subject the municipality finds necessary and proper for the general welfare and convenience of the municipality, including to execute and deliver contracts, to assist in redeveloping blighted areas, and to expend public funds for economic development; and

**WHEREAS**, the Council has further determined that the Town should offer certain incentives to encourage private investment and recruit both small businesses and new employers to the Incentive Areas; and

**WHEREAS**, while the Incentives may benefit the Incentive Recipients (as defined herein), the primary beneficiary of the Incentives will be the Town and its citizens who shall realize the following benefits (the "Benefits"):

- (i) Increased property values within the Incentive Areas and the Town as a whole;
- (ii) Increased revenue from property taxes, business license fees, and permit fees;
- (iii) Increased tourism and commercial activity within the Town as a whole; and
- (iv) Meeting needs of the community residents by encouraging growth within targeted sectors to provide adequate services to Town residents; and
- (v) Assist in providing access to a variety of affordable housing options; and,

**WHEREAS**, the Incentives, as provided for in an Incentive Agreement (as defined herein), shall be structured in such a way that the value of the Benefits to the Town will exceed the value to the Incentive Recipients; and

**WHEREAS**, the financial benefit of the Incentives to the Incentive Recipients will only be realized at such time as certain Benchmarks (as defined herein) are met or continue to be met. Should all the Benchmarks be accomplished, the Town believes that there is a high probability that the Benefits will be realized by the Town and that the value of the Benefits will exceed the value public funds expended on the Incentives; and

**WHEREAS**, Encompass Health Corporation ("Developer") owns real property (the "Property") in the Town of Bluffton, South Carolina (the "City") and to develop the Property; and

**WHEREAS**, on the Property, Developer intends (a) to invest eleven million three hundred thousand dollars (\$11,300,000) to expand on the property eight thousand two hundred and fifty (8,250) square feet of medical and healthcare space (collectively, the "Development") located at 107 Seagrass Station Road in Bluffton, and (b) create over thirty (30) jobs, earning an average of eighty-two dollars annually (\$82,000)



**BE IT ORDAINED BY THE TOWN COUNCIL OF THE TOWN OF BLUFFTON, SOUTH CAROLINA, AS FOLLOWS:**

- 1. The City hereby authorizes the Town Manager to make minor corrections, execute, and deliver such documents as may be necessary or useful to affect the implementation of the Economic Development Agreement attached to this ordinance.
- 2. The Project Agreement, with whatever changes are (a) not materially adverse to the Town and (b) approved by the Town Manager (after advice of Town’s counsel), is approved and is incorporated by reference in this Ordinance as if set forth fully in the Ordinance’s body. The Town Manager’s execution of the final Project Agreement shall be conclusive evidence of the Town’s approval thereof.
- 3. The Town Manager is, acting alone, authorized to take whatever actions and execute and deliver whatever documents (including the Project Agreement) as either of them deems appropriate to affect this Ordinance’s intent.

**THIS ORDINANCE SHALL BE EFFECTIVE IMMEDIATELY UPON SECOND READING.**

**TOWN OF BLUFFTON, SOUTH CAROLINA**

Larry Toomer Mayor

*Sent via email: cforster@townofbluffton.com*

September 23, 2024

Mr. Chris Forster  
Assistant Town Manager  
Town of Bluffton, SC  
20 Bridge Street  
Bluffton, SC 29910

**Re: Project Sabal - Request for Economic Development Incentives**

Dear Mr. Forster,

Earlier this year, a member of my team (Shawn Patzkowsky) spoke with Bluffton Assistant Town Manager, Chris Forster, and the CEO of the Don Ryan Center for Innovation, Inc, David Nelems, to discuss the prospect for economic development incentives for a health care project in Bluffton, SC. Based on guidance from Chris and David, we are submitting this formal request for incentives and Project Profile Worksheet for your consideration.

**Company Overview:**

With a national footprint that includes 150+ hospitals in 36 states and Puerto Rico, Encompass Health Corporation ([www.encompasshealth.com](http://www.encompasshealth.com), “EHC”, or the “Company”) is the largest owner and operator of physical rehabilitation hospitals in the United States. The Company has approximately 38,500 employees and controls approximately 25% of licensed inpatient rehabilitation hospital beds. Approximately 229,500 patients are discharged from EHC facilities annually.

EHC provides high-quality, compassionate rehabilitative care for patients recovering from a major injury or illness. We utilize advanced technology and innovative treatments to maximize recovery. The typical EHC patient is an individual (often 65+) that has been discharged from an acute care hospital, but still requires a hospital level of care alongside intensive physical therapy to regain the strength and stamina to successfully transition home. These patients are admitted to an EHC facility where they are scheduled to receive at least three hours of physical therapy per day, five days per week. The average length of stay is approximately 12 days.

As the nation’s largest provider of inpatient rehabilitation, our teams have the tools, resources and support to set the standard for excellent patient care. We foster a culture of compassion and collaboration, encouraging the empowerment of employees to learn

and grow together. EHC is ranked as one of Fortune’s 100 Best Companies to Work For and Modern Healthcare’s Best Places to Work in Healthcare.

**Project Overview:**

EHC is the sole owner of Encompass Health Rehabilitation Hospital of Bluffton, LLC (“Bluffton, LLC”), which is a 38-bed inpatient physical rehabilitation hospital located at 107 Seagrass Station Road, Bluffton, SC 29110. The real property utilized by Bluffton, LLC is secured via intercompany lease with Encompass Health South Carolina Real Estate, LLC (“Real Estate, LLC”), which is also a wholly owned subsidiary of EHC (See [Attachment A](#)). Bluffton, LLC and Real Estate, LLC are hereafter jointly referred to as “EHC Bluffton”.

The proposed project is an addition of 12-beds to the Bluffton, LLC facility (increasing to 50-beds total), expansion of the existing therapy gym, addition of a dialysis suite and creation of additional parking. The additional private rooms will be in a one-story, approximately 8,250 square foot addition, which will be constructed on the southeast side of the hospital campus. This addition will also include a day room, a multipurpose room, and other support spaces. The gym will be expanded by approximately 900 square feet. The four-bay dialysis suite will be in approximately 900 square feet of additional space adjacent to the existing wing of patient beds. The additional parking will be established through a reconfiguration of the parking area which will add 56 parking spaces to the hospital campus. The expansion project will include a total of approximately 10,050 square feet of new space. Please see [Attachment B](#) for a map identifying the location of Bluffton, LLC, a project site plan and a project space plan.

This project will enable Bluffton, LLC to help address the area's need for additional inpatient rehabilitation capacity identified by the 2024 South Carolina Health Plan (“State Health Plan” or “Plan”). The 2024 Plan identifies a need for 35 additional beds in the service area which includes Beaufort, Jasper, and Hampton counties.

Adding the dialysis suite at Bluffton, LLC will increase the number of dialysis patients that can be treated simultaneously at the hospital and will double the hospital's capacity to provide inpatient rehabilitation care for dialysis patients. This project will also provide patients, family, and staff with extra gym space and parking. This project will not involve the development of a new service or the discontinuance of an existing service.

If all internal approvals are secured for Project Sabal, construction is expected to begin in the fourth quarter of 2025. Assuming there are no extraordinary events or circumstances beyond the control of the parties involved, construction is expected to be completed in the the third quarter of 2026.



As noted in the Project Profile Worksheet accompanying this letter, the total project cost is estimated to be \$11,300,000. Project cost is broken down as follows:

Building and Sitework	\$ 8,930,000
Architect/Engineering Fees	\$ 790,000
Equipment Costs	\$ 1,200,000
Permitting & Fees	\$ 380,000
Estimated Total Cost	\$11,300,000

Project Sabal is expected to create approximately 10 new jobs by the end of the first year after completion and up to a total of 30 new jobs within five years. Average wages for full-time jobs added after Project Sabal is completed is estimated to be \$73,000 per year, working up to an average of \$82,000 per year by year five.

**Request for Grant:**

In accordance with the Amended Town of Bluffton Municipal Code of Ordinances, Chapter 6, Article VI, Exhibit I, we ask that you consider an offer of economic development incentive grant for Project Sabal. Our expansion project is located within the designated Incentive Area and will contribute to the goals and benefits identified in Article VI as warranting consideration for an incentive offer. Any offered incentives would be greatly appreciated. An offer of multiple incentives including 1) up to 50% of the town’s planning, building permit fees and other review fees; 2) up to 50% of the business license fees collected by the town for up to five years; 3) up to 100% of the Beaufort-Jasper Water & Sewer Authority’s capacity fees and 4) any other incentives that the Council may offer, potentially including a property tax abatement, would be that much more impactful and contribute further the long-term success of the hospital.

If you have any questions about this request or the accompanying Beaufort County Project Profile Worksheet, please contact Shawn Patzkowsky at (205) 970-5673, or [shawn.patzkowsky@encompasshealth.com](mailto:shawn.patzkowsky@encompasshealth.com).

Respectfully,



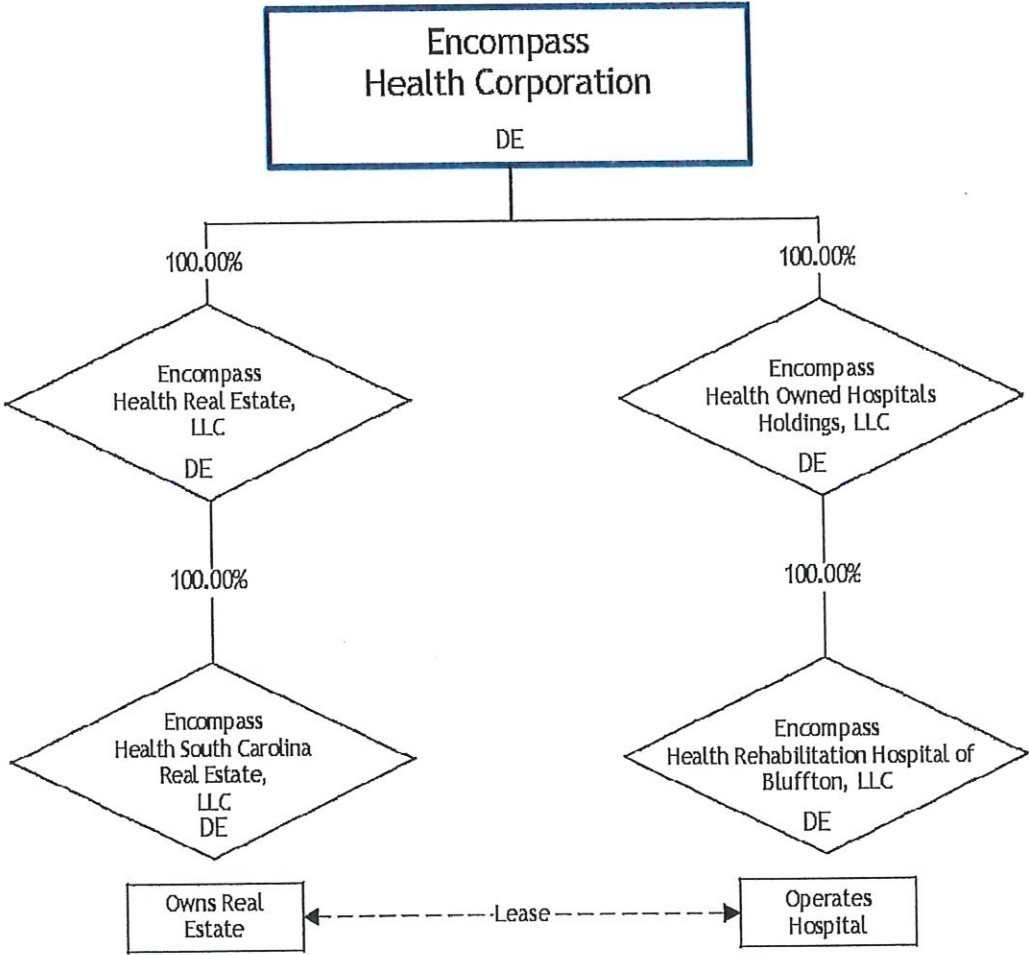
Robert W. McCallum, III  
Vice President

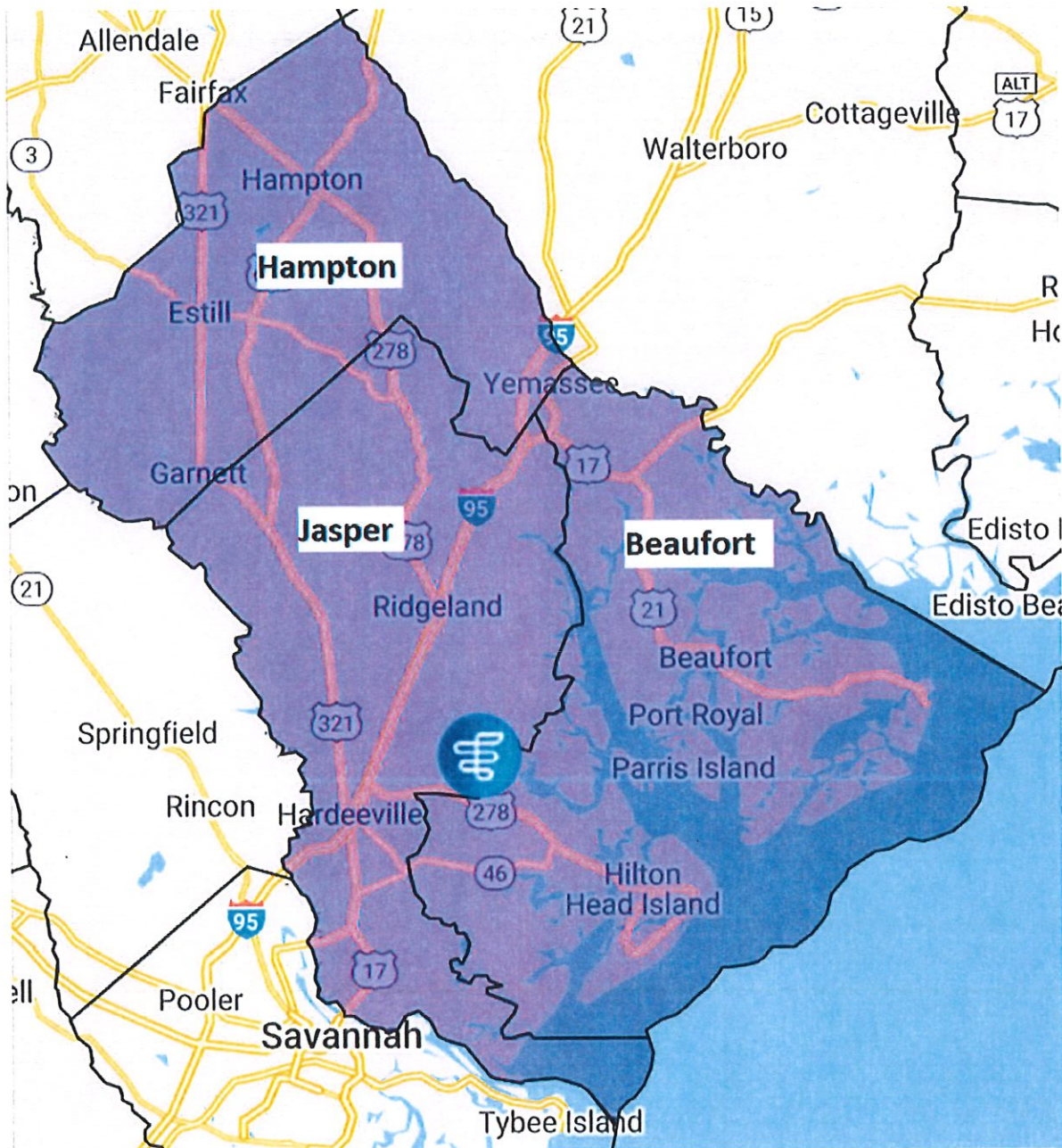
RWM/sep

Enclosure

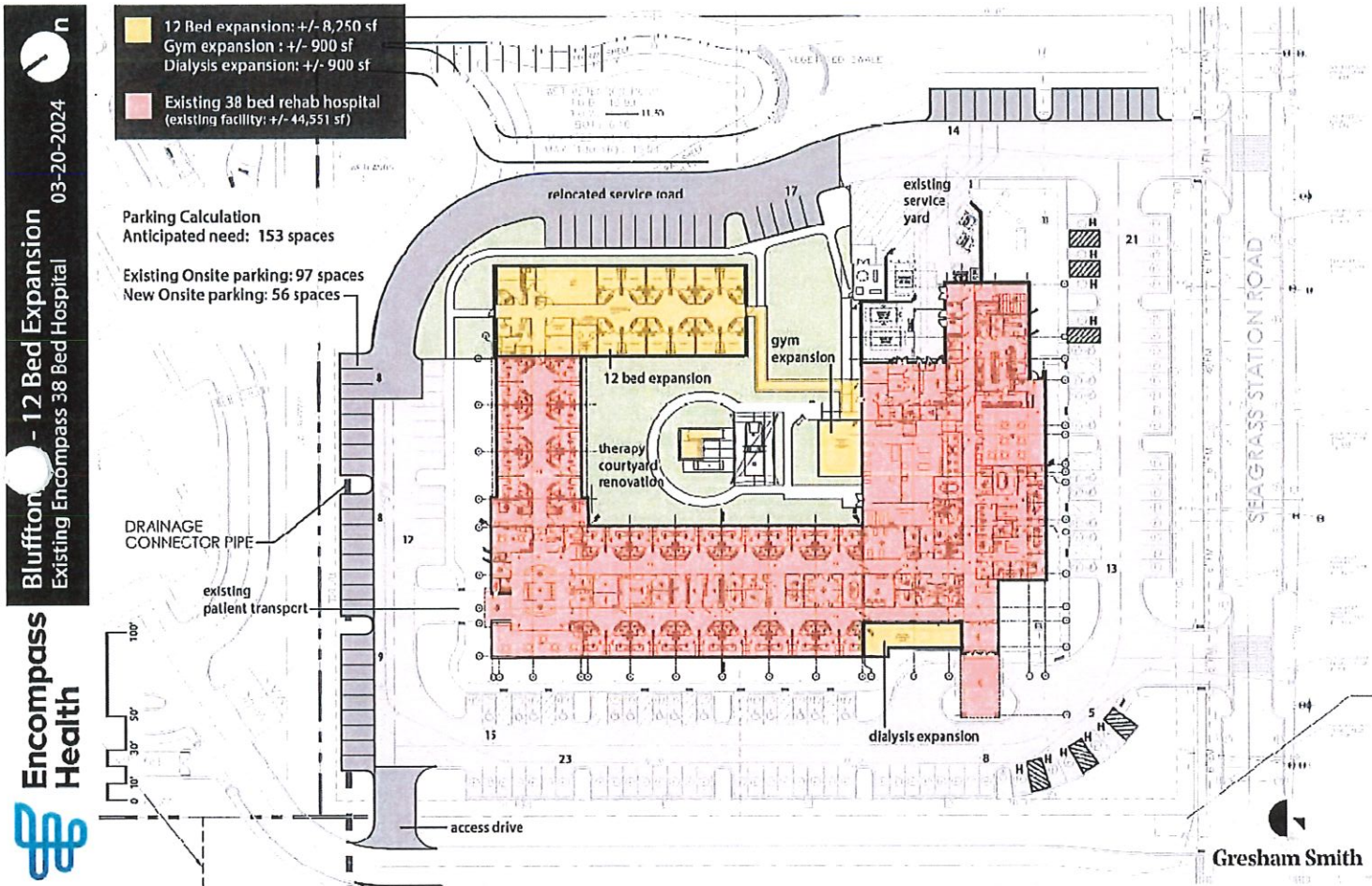
Attachment A

Encompass Health Rehabilitation Hospital of Bluffton, LLC and  
Encompass Health South Carolina Real Estate, LLC







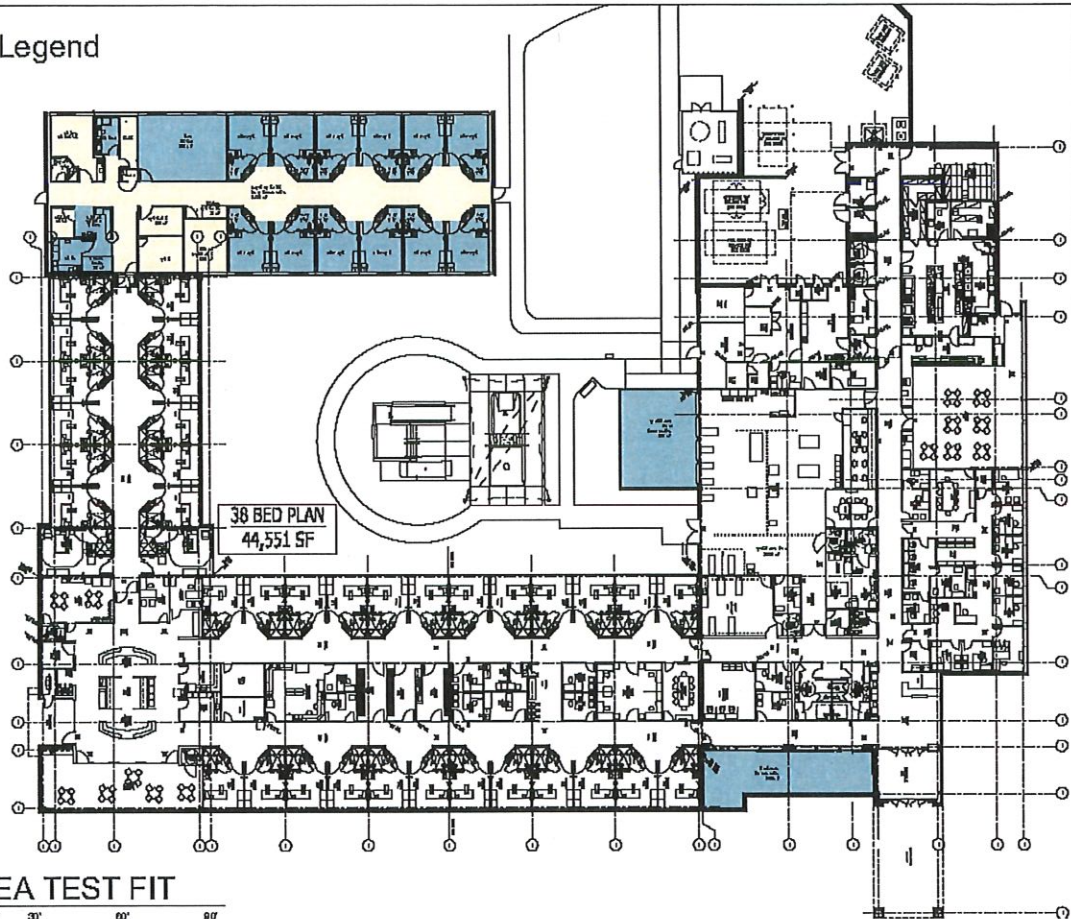


# Clinical Area Color Legend

- CLINICAL
- NON-CLINICAL
- EXISTING HOSPITAL (NOT IN SCOPE)

## Area Schedule (Clinical Area)

Name	Area
CLINICAL	6790 SF
NON-CLINICAL	3265 SF
	10055 SF



## 1 CLINICAL AREA TEST FIT

1" = 30'-0"

0' 15' 30' 60'

A000  
03/20/24

ENCOMPASS HEALTH REHABILITATION HOSPITAL AT BLUFFTON  
107 Sagamore Station Road, Bluffton, SC 29910

Crisham  
Smith



## Project Profile Worksheet

Section X. Item #1.

Project Information	
Company Name:	Encompass Health Rehabilitation Hospital of Bluffton, LLC Encompass Health South Carolina Real Estate, LLC
Project Name:	Project Sabal
Type of Project:	Expansion in SC
Type of Entity:	LLC
Type of Business:	Service
NAICS or SIC Code:	622310
Address:	107 Seagrass Station Road, Bluffton, SC 29910-9549
Completed By:	Shawn Patzkowsky
Phone Number:	(205) 970-5673
Email Address:	<a href="mailto:shawn.patzkowsky@encompasshealth.com">shawn.patzkowsky@encompasshealth.com</a>
Date:	7/31/24



### Project Description - Please include the product/service and a brief description of the project including timing.

Encompass Health Rehabilitation Hospital of Bluffton, LLC ("Bluffton, LLC") operates a 38-bed inpatient physical rehabilitation hospital located at 107 Seagrass Station Road, Bluffton, SC 29910. The real property associated with this facility is owned by Encompass Health South Carolina Real Estate, LLC ("Real Estate, LLC") and is leased by Bluffton, LLC via intercompany lease. Both entities are subsidiaries of Encompass Health Corporation ("EHC"). Patients at Bluffton, LLC are typically recovering from a life-changing illness or injury. Our specialties include neurological rehabilitation, orthopedic rehabilitation, stroke rehabilitation and spinal cord injury rehabilitation. Patients are typically admitted for approximately 12 days, during which they receive 3 hours of physical therapy 5 days per week. Our expert clinicians combine the latest technologies, real-world simulations and advanced therapies into a treatment plan that helps develop the strength and stamina needed to transition home. The proposed project is a bed-expansion, which would add 12 new single-patient rooms to the existing 38 bed hospital. The exact timing of the construction process is not yet known. Hospital projects in South Carolina require a Certificate of Need ("CON") from the Bureau of Facilities and Services Development at the South Carolina Department of Health and Environmental Control. Once a CON granted, next steps will be formalized. It is expected that construction will begin in 2025 and will be completed in 2026.

### Project Alternatives - Are other sites or project configurations under consideration? Please list other potential locations.

Funding for the project will be provided by the parent of the applicants, Encompass Health Corporation (EHC). EHC owns and operates 150+ inpatient physical rehabilitation hospitals in 36 states and Puerto Rico. EHC is committed to expanding its operations via new hospital projects and expansion of existing hospitals. With a limited pool of capital investment available, project opportunities are evaluated against one another to determine which should receive funding. As of July 5, 2024, there were 42 separate new hospital projects across 21 states being evaluated.

Estimated Capital Investment	Year 1	Year 2	Year 3	Year 4	Year 5	
	2025	2026	2027	2028	2029	Total
Land Costs	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Building - New Construction	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Building - Purchase of Existing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Building - Renovations						
~Internal Renovations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
~External Renovations	\$ 2,100,000	\$ 8,000,000	\$ -	\$ -	\$ -	\$ 10,100,000.00
Building - Leasehold Improvements	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Machinery & Equipment - New		\$ 1,200,000	\$ -	\$ -	\$ -	\$ 1,200,000.00
Machinery & Equipment - Used	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Pollution Control Equipment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Capital Investment</b>	<b>\$ 2,100,000.00</b>	<b>\$ 9,200,000.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 11,300,000.00</b>

Estimated New Jobs at New Facility						Section X. Item #1.
<i>Jobs are full time employees of the Company</i>	By the end of the First Year of Operation	By the end of the Second Year of Operation	By the end of the Third Year of Operation	By the end of the Fourth Year of Operation	By the end of the Fifth Year of Operation	
	2026	2027	2028	2029	2030	

Employment Category	New Full Time Jobs Created	Avg Hourly Wage	New Full Time Jobs Created	Avg Hourly Wage	New Full Time Jobs Created	Avg Hourly Wage	New Full Time Jobs Created	Avg Hourly Wage	New Full Time Jobs Created	Avg Hourly Wage	Total New Jobs to SC
Managerial		\$ -		\$ -		\$ -		\$ -		\$ -	
Professional	10	\$ 39.06	4	\$ 40.23	5	\$ 41.43	6	\$ 42.68	6	\$ 43.96	
Technical		\$ -		\$ -		\$ -		\$ -		\$ -	
Sales		\$ -		\$ -		\$ -		\$ -		\$ -	
Clerical		\$ -		\$ -		\$ -		\$ -		\$ -	
Craftsman (skilled)		\$ -		\$ -		\$ -		\$ -		\$ -	
Operators (semi-skilled)		\$ -		\$ -		\$ -		\$ -		\$ -	
Laborers (unskilled)		\$ -		\$ -		\$ -		\$ -		\$ -	
Service		\$ -		\$ -		\$ -		\$ -		\$ -	
		\$ -		\$ -		\$ -		\$ -		\$ -	
		\$ -		\$ -		\$ -		\$ -		\$ -	Total New Jobs to SC
		\$ -		\$ -		\$ -		\$ -		\$ -	
<b>New Job Creation to Date and Avg. Weekly Wage</b>	10	\$ 39.06	4	\$ 40.23	5	\$ 41.43	6	\$ 42.68	6	\$ 43.96	31

Estimated Jobs Relocated to New Facility		
<i>Jobs are full time employees of the Company</i>		
Employment Category	Full Time Jobs	Avg Annual Wage
Discretionary by employee; none employer directed		\$ -
		\$ -

Estimated Utility Requirements (or increase if expansion):	
Water	50 gpm
Sewer	1500 GPD
Electric	125 KW
Gas	100 CFH
Use of Port?	Not Applicable

Estimated Business Activities:	
Annual Materials Purchased for Operations:	Additional ~ \$100,000 per year
Annual Number of Visitors to the Facility:	Discharges from 1,100 to 1,400 over 5 years
Avg Visitors Length of Stay:	12 days per patient

**Benefits - Please provide a brief description of the benefit package offered to employees in the area below. Please include percentage paid by employer.**

EHC offers full-time employees a comprehensive benefits package which includes a 401(k) retirement savings plan, several health insurance plans to choose from, as well as plans for prescription medications, life, accidental death & dismemberment, short term & long term disability, dental and vision insurance. The percentage of health insurance paid by EHC depends upon the health insurance plan selected by the employee. The company paid percentage for these plans are as follows:

- 401(k) retirement savings plan - Employer matches 50% of the first 6% of employee pay contributed to the plan.
- Health insurance & prescription medication coverage - Employer paid portion is 74%.
- Basic Life Insurance - Fully paid by EHC for coverage up to 1x annual base salary up to \$500K.
- Accidental Death & Dismemberment Insurance - Fully funded by employee.
- Short-term Disability Insurance - Fully funded by employee.
- Long-Term Disability - Fully paid by EHC for coverage up to 50% of salary up to \$10,000 monthly benefit.
- Dental Insurance - Employer portion paid is 46%.
- Vision Insurance - Fully funded by employee.

EHC also offers reimbursement of tuition and associated mandatory fees for up to two courses per academic term, with an annual maximum per individual of \$3,500 for full-time and \$1,750 for part-time employees.

**Briefly describe the financing structure for this project.**

It is anticipated that the project will be funded from accumulated earnings and current cash flow.

STATE OF SOUTH CAROLINA )  
 )  
COUNTY OF BEAUFORT )

**THIS AGREEMENT** dated the \_\_\_\_ day of \_\_\_\_\_, 202\_, is between the Town of Bluffton, S.C., a municipal corporation with offices at 20 Bridge Street, SC 29910 ("Town"), and Encompass Health Corporation, ("Developer") an Alabama based corporation located at 9001 Liberty Parkway Birmingham, AL 35242.

## BACKGROUND STATEMENT

One of the primary missions of the Town is to encourage economic development and thereby improve the tax base and enhance the livability of the Bluffton area.

In September 12, 2023, the Bluffton Town Council adopted an Ordinance (“the Ordinance”) establishing an economic development incentive plan. The Ordinance was codified as Article VI within Chapter 6 – Businesses and Business Regulations, and is incorporated herein by reference.

The Developer has acquired commercial property located at 107 Seagrass Station Road; the property is within the Town limits and within the Incentive Area identified in the Ordinance.

The Developer has requested an economic incentive grant from the Town in return for the Developer's agreement to expand existing medical and healthcare space in the amount of 8,250 square feet used for an eligible use as outlined in the Ordinance.

Revenues from business licenses, stormwater fees, building permits and property taxes are estimated to exceed \$172,841 in a five-year period. There is also an estimate that the development will create an additional 30 jobs.

Based upon the foregoing, the Town Council of the Town of Bluffton has determined that the mission of the Town to encourage economic development will be enhanced by the completion of the Developer's project.

## STATEMENT OF AGREEMENT

1. In consideration of the mutual representations, warranties, covenants and agreements contained herein, the parties hereto agree as follows:
2. The Developer will expand existing medical and healthcare space in the amount of 8,250 square feet for uses eligible in the Ordinance. The Developer expects construction to begin in the fourth quarter of 2025 that complies with the definition of eligible uses as referenced in the Ordinance. All potential business occupants must fall within the uses identified in the

Ordinance, Section 6-145(a)(5) or the grant award may be amended in accordance with the Ordinance, Section 6-146(c)(3).

3. The Town will pay the Developer a grant based on the increase in fees and business

licenses. The grant will be provided over a five-year period on the 1<sup>st</sup> of the month in which the expansion opens and on such date each subsequent year, contingent upon a certificate of occupancy being issued to an occupant who fits the definition of eligible use in the Ordinance. The grants will be percentage based on the increase in values over the bases established for each of the below categories for the following percentages.

	Year 1	Year 2	Year 3	Year 4	Year 5
Permit Fees	50%	-	-	-	-
BJWSA	100%				
Business License	50%	50%	50%	50%	50%

The Business License amount will be set based on the amount paid at the time of issuing their building permit and subsequently on their paid renewal application amount that covers an entire twelve-month operation period. The permit fees will be based on the fees paid for work done prior to the Certificate of Occupancy and initial Business License of any tenants being issued.

4. The total amount of the grant shall not be greater than the direct value received by the Town and delivered from the capital investment during the contribution period.
5. The benchmarks, measures and reporting for this Agreement shall be:

Benchmark	Measure	Reporting
Target industries	Healthcare, and or medical; in the alternative, provide notice of expansion to all target industries in the Ordinance	Provision of tenant’s business license with the Town of Bluffton.
Total project investment	\$11,300,000	Budget spreadsheet with accompanying invoices and proof of payment.
Property valuation		

6. Notifications shall be addressed:

To Developer:

Shawn Patzkowsky

Encompass Health Corporation

To Town:

Town Manager

Town of Bluffton

20 Bridge Street

Bluffton, SC 29910
7. The Background Statement above is included in the terms of this agreement. The terms and conditions of the Ordinance are incorporated by reference.

IT IS SO AGREED as of the date above first written.

**Encompass Health Corporation    Town of Bluffton, South Carolina**

By:\_\_\_\_\_ By:\_\_\_\_\_

Its:\_\_\_\_\_ Its:\_\_\_\_\_

## Recommended Motion

Consideration of An Ordinance Authorizing an Economic Development Incentive Agreement between the Town of Bluffton and Encompass Health Corporation, Inc. – David Nelems, DRCI CEO

**“I make a motion to approve first reading of an Ordinance Authorizing an Economic Development Grant Incentive Agreement between the Town of Bluffton and Encompass Health Corporation Development of an 8,200 square feet expansion of Medical and Healthcare Facility Space located at 107 Seagrass Station Road in Bluffton.”**

TOWN COUNCIL

STAFF REPORT  
Executive Department



MEETING DATE:	January 14, 2025
PROJECT:	Consideration of An Ordinance Authorizing an Economic Development Incentive Agreement between the Town of Bluffton and CS Industries LLC. – Second and Final Reading
PROJECT MANAGER:	David Nelems, DRCI CEO

**REQUEST:** Request for Town Council to approve second and final reading of an ordinance approving the execution and delivery of an economic development agreement with CS Industries LLC.

**UPDATES SINCE FIRST READING:** The company estimates to generate \$3 million in annual revenue at the new Bluffton headquarters and grow to \$8-10 million annually by 2030.

**BACKGROUND:**

The laws or Constitution of the State of South Carolina, 1895, as amended, empowers towns to enact ordinances related to the expenditure of public funds for public purposes and necessary for the Town to levy certain taxes and fees.

Town residential development has grown exponentially over the past decade. Commercial development has lagged the residential growth. Certain areas of the Town of Bluffton, notably west of Buckwalter parkway, are experiencing a void of commercial development in certain critical service industries. There also remains a lack of affordable housing to accommodate the demand for a diverse local workforce.

In September of 2023 the Bluffton Town Council adopted an Ordinance establishing an economic development incentives plan:

- (i) To promote the redevelopment of existing buildings and infill development within the Incentive Areas;
- (ii) To support the establishment of the categories of new businesses that the Council determines will significantly increase the overall commercial activity within the Town, provide the Town's residents with sufficient options within the Town rather than having to travel elsewhere; encourage tourists and those who reside in surrounding communities to make use of businesses within the Town; and increase property values within the Town as a whole; and



- (iii) To develop the Incentive Areas into commercial spaces that match the Town's sense of place and contributes to the Council's overall priorities established within our Comprehensive and Strategic Plans; and
- (iv) To support the development of affordable housing to encourage relocation of professionals working in one of the professions supported by the incentivized developments.

The intended use of the development must be for one or more of the following business purposes:

healthcare, dental, home health, pharmaceutical retail, and similar ancillary uses;

- (i) childcare services;
- (ii) affordable housing developments (separately or part of a larger project);
- (iii) mixed use commercial and similar flex-use space;
- (iv) corporate headquarters; and
- (v) other uses, as may be determined by the Council, that are consistent with the Goals, and the Plans.

#### **DISCUSSION:**

Staff received a grant request from Martin Zeller, with CS Industries LLC. (CS). CS intends to build an 11,000 square foot building on Pinellas Drive. If awarded a grant, CS will make this their U.S. Region Headquarters. CS is a manufacturer of compressed air and gas instrumentation with world headquarters located in Germany.

The total investment is estimated to be \$3,600,000. It is expected to employ up to 13 new jobs. They hire and train local workforce and their average salary is approximately \$80,000. The estimated project completion is by December 2025.

The development will generate an estimated \$7,200 in property taxes annually and an estimated \$5,600 in business license revenue related to the construction and \$2,000 in business license revenue annually. Development fees are expected to generate \$31,000.

The ordinance allows for grant awards equal to; up to 50% of all permitting fees, up to 100% of BJWSA capacity fees and up to 50% of business license fees for up to five years. The Council has additional discretion to grant additional grant amount if deemed necessary to advance the goals of the ordinance.

Staff have developed the following guide for determining eligible grant amounts based on the

significance of qualifying developments.

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)

Based on the size of the CS proposed developments, the higher paying new jobs, and the establishment of their U.S. headquarters in the Town of Bluffton, staff recommends the following grant percentages. It is recommended that CS receive an economic development incentive grant equal to 50% of all town permitting and development fees, 100% of their BJWSA capacity fees and 50% of business license fees for five years as it relates to the portion of the project dedicated for incentive eligible uses and 50% of Town of Bluffton property taxes for five years.

The estimated fees related to the Raider Drive development and estimated grant mounts are as follows:

Fee	Total	Year 1	Year 2	Year 3	Year 4	Year 5
Building Permit Fees	\$ 22,400	\$ 11,200				
Development Agreement Fees	9,000	4,500				
Stormwater Fees	3,000	1,500				
BJWSA Capacity Fee	12,000	12,000				
Business License Fee	5,600	2,800	2,000	2,000	2,000	2,000
Property Tax (Bluffton Only)	12,000	6,000	6,000	6,000	6,000	6,000
	<b>\$ 64,000</b>	<b>\$ 38,000</b>	<b>\$ 8,000</b>	<b>\$ 8,000</b>	<b>\$ 8,000</b>	<b>\$ 8,000</b>

Estimated Total 5 year Benefit **\$ 70,000**

\*These are estimates and actuals are subject to change.

The estimated benefit and net revenue to the Town over 5 years for the Raider Drive development are as follows:

Bluffton Taxes / Fees Estimate (5 Year Total)	Amount
Initial Building & Development Fees	\$ 34,400
Property Taxes	60,000
Business License Fees	21,600
Total Taxes & Fees	<b>\$ 116,000</b>
Five Year Grant Total	<b>\$ 70,000</b>
Net Revenue (Initial 5 Years)	<b>\$ 46,000</b>

**NEXT STEPS:** The Town Council may approve the ordinance as submitted, approve with

amendments, or deny approval of the ordinance.

**ATTACHMENTS:**

1. Ordinance
2. Grant Request Letter
3. Project Profile Worksheet
4. Site Plan
5. Building Rendering
6. Motion

**AN ORDINANCE OF THE TOWN OF BLUFFTON, SOUTH CAROLINA,  
APPROVING THE EXECUTION AND DELIVERY OF A DEVELOPMENT  
AGREEMENT WITH CS INDUSTRIES, LLC**

**WHEREAS**, South Carolina law authorizes municipalities to take actions not inconsistent with the Constitution and general laws of the State, regarding any subject the municipality finds necessary and proper for the general welfare and convenience of the municipality, including to execute and deliver contracts, to assist in redeveloping blighted areas, and to expend public funds for economic development; and

**WHEREAS**, the Council has further determined that the Town should offer certain incentives to encourage private investment and recruit both small businesses and new employers to the Incentive Areas; and

**WHEREAS**, while the Incentives may benefit the Incentive Recipients (as defined herein), the primary beneficiary of the Incentives will be the Town and its citizens who shall realize the following benefits (the "Benefits"):

- (i) Increased property values within the Incentive Areas and the Town as a whole;
- (ii) Increased revenue from property taxes, business license fees, and permit fees;
- (iii) Increased tourism and commercial activity within the Town as a whole; and
- (iv) Meeting needs of the community residents by encouraging growth within targeted sectors to provide adequate services to Town residents; and
- (v) Assist in providing access to a variety of affordable housing options; and,

**WHEREAS**, the Incentives, as provided for in an Incentive Agreement (as defined herein), shall be structured in such a way that the value of the Benefits to the Town will exceed the value to the Incentive Recipients; and

**WHEREAS**, the financial benefit of the Incentives to the Incentive Recipients will only be realized at such time as certain Benchmarks (as defined herein) are met or continue to be met. Should all the Benchmarks be accomplished, the Town believes that there is a high probability that the Benefits will be realized by the Town and that the value of the Benefits will exceed the value public funds expended on the Incentives; and

**WHEREAS**, CS Industries, LLC ("Developer") owns, or intends to purchase, real property (the "Property") in the Town of Bluffton, South Carolina (the "City") and to develop the Property; and

**WHEREAS**, on the Property, Developer intends (a) to invest three million six hundred thousand dollars (\$3,600,000) to purchase, design, and construct on the property eleven thousand (11,000) square feet of economic development eligible office space (collectively, the "Development") in the area of Pinellas Drive, and (b) create thirteen (13) jobs, earning an average of eighty thousand dollars annually (80,000).

**BE IT ORDAINED BY THE TOWN COUNCIL OF THE TOWN OF BLUFFTON, SOUTH CAROLINA, AS FOLLOWS:**

1. The City hereby authorizes the Town Manager to make minor corrections, execute, and deliver such documents as may be necessary or useful to affect the implementation of the Economic Development Agreement attached to this ordinance.
2. The Project Agreement, with whatever changes are (a) not materially adverse to the Town and (b) approved by the Town Manager (after advice of Town’s counsel), is approved and is incorporated by reference in this Ordinance as if set forth fully in the Ordinance’s body. The Town Manager’s execution of the final Project Agreement shall be conclusive evidence of the Town’s approval thereof.
3. The Town Manager is, acting alone, authorized to take whatever actions and execute and deliver whatever documents (including the Project Agreement) as either of them deems appropriate to affect this Ordinance’s intent.

**THIS ORDINANCE SHALL BE EFFECTIVE IMMEDIATELY UPON SECOND READING.**

**TOWN OF BLUFFTON, SOUTH CAROLINA**

\_\_\_\_\_  
Larry Toomer  
Mayor

(SEAL)

Attest:

\_\_\_\_\_  
Marcia Hunter  
Town Clerk

First Reading: \_\_\_\_\_

Second Reading: \_\_\_\_\_

**EXHIBIT A**

**GRANT AGREEMENT**

**(SEE ATTACHED)**



**CS INSTRUMENTS USA Inc.**  
110 Traders Cross  
Bluffton, SC 29909, USA

Phone: +1 843 599 6700  
Email: [info-us@cs-instruments.com](mailto:info-us@cs-instruments.com)  
[www.cs-instruments.com/us](http://www.cs-instruments.com/us)

CS INSTRUMENTS USA INC. | 110 Traders Cross, Bluffton, SC 29909, USA

To whom it may concern

6 November 2024

**Re: Grant application for CS INSTRUMENTS USA – Americas Headquarter**

Dear Sirs,

CS INSTRUMENTS is a manufacturer and innovator of compressed air and – gas instrumentation headquartered in Germany. Their sophisticated, world leading solutions help medium to large manufacturers around the globe produce their products efficiently and sustainably. The serviced sectors are automotive, food & beverage, medical device & pharmaceuticals, oil & gas, government, and many more.

Reference customers in the USA:



CS INSTRUMENTS has had their sales office in Bluffton, South Carolina since 2021. The rapidly growing success of its small organization of currently only three employees requires a significant investment in the Americas' territory in building the regional headquarters with expanded responsibilities. The additional responsibilities shall include but are not limited to:

- Regional Headquarter with support functions to all future CS Americas organizations
- Sales
- Marketing
- Local warehousing to shorten lead times and help bridge supply gaps
- On Site - Installation Service
- Calibration Service
- Light assembly
- Customer experience - and Training Center

**CS INSTRUMENTS USA Inc.**  
110 Traders Cross, Bluffton, SC 29909, USA





CS INSTRUMENTS

CS INSTRUMENTS USA Inc.  
110 Traders Cross  
Bluffton, SC 29909, USA

Phone: +1 843 599 6700  
Email: [info-us@cs-instruments.com](mailto:info-us@cs-instruments.com)  
[www.cs-instruments.com/us](http://www.cs-instruments.com/us)

CS INSTRUMENTS is assessing different locations in Atlanta (GA), Charlotte (NC), and Bluffton (SC). The preferred identified location in Bluffton is at Pinellas Drive. Negotiations with the builder/seller are under way – site clearance has already begun. Move-in date is foreseen to be July of 2025.

The Bluffton project is a 1 ac lot with a total 11,000 sqft facility with two modern, energy efficient buildings offering a welcoming and productive work environment.

In the startup phase it is planned to occupy a total of about 5,000 sqft, leasing out the remainder to interested tenants, providing the applicant the flexibility of taking over more space when needed.

Midterm CS INSTRUMENTS is planning to hire a local qualified work force (up to 13) considering veterans, college/high school graduates and local professionals.

The planned total investment is budgeted for up to \$3,600,000.

CS INSTRUMENTS USA would like to apply for a grant for our project. We do appreciate your time and consideration in helping us choose a suitable location for our Americas HQ in the United States of America.

Kind Regards,



Wolfgang Blessing  
CEO CS INSTRUMENTS GmbH & Co. KG  
Founder/ Owner/ Investor



Martin Zeller  
General Manager, Vice President  
Founder CS INSTRUMENTS USA

Project Profile Worksheet	
Project Information	
<b>Company Name:</b>	CS INSTRUMENTS USA Inc.
<b>Project Name:</b>	Americas HQ (North/Central/South)
<b>Type of Project:</b>	Expansion in SC
<b>Type of Entity:</b>	C Corp
<b>Type of Business:</b>	Combination thereof, please provide explanation below.
<b>NAICS or SIC Code:</b>	334515
<b>Address:</b>	110 Traders Cross, Bluffton, SC 29909
<b>Completed By:</b>	Martin Zeller
<b>Phone Number:</b>	239-3263030
<b>Email Address:</b>	<a href="mailto:m.zeller@cs-instruments.com">m.zeller@cs-instruments.com</a>
<b>Date:</b>	6/19/2024


**Project Description - Please include the product/service and a brief description of the project including timing.**

This will be the location of our newly established Americas-Headquarters, with sales/marketing, distribution, light assembly and full service location for the geographical territory of USA, Canada, Mexico & Latin America. We aim at a quick build/move in date. Move-in date targeted for 7/1/2025. Multiple locations are in consideration.

**Project Alternatives - Are other sites or project configurations under consideration? Please list other potential locations.**

Bluffton SC (Pinellas Drive)  
Bluffton SC (Lawton Station Blvd)  
Atlanta, GA  
Charlotte, NC

Estimated Capital Investment	Year 1	Year 2	Year 3	Year 4	Year 5	
	2024	2025	2026	2027	2028	Total
Land Costs	\$ 400,000	\$ -	\$ -	\$ -	\$ -	\$ 400,000.00
Building - New Construction	\$ -	\$ 2,800,000			\$ -	\$ 2,800,000.00
Building - Purchase of Existing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Building - Renovations						
~Internal Renovations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
~External Renovations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Building - Leasehold Improvements	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Machinery & Equipment - New	\$ -	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000	\$ 400,000.00
Machinery & Equipment - Used	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Pollution Control Equipment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Capital Investment</b>	<b>\$ 400,000.00</b>	<b>\$ 2,900,000.00</b>	<b>\$ 100,000.00</b>	<b>\$ 100,000.00</b>	<b>\$ 100,000.00</b>	<b>\$ 3,600,000.00</b>

Estimated New Jobs at New Facility					
<i>Jobs are full time employees of the Company</i>	By the end of the First Year of Operation	By the end of the Second Year of Operation	By the end of the Third Year of Operation	By the end of the Fourth Year of Operation	By the end of the Fifth Year of Operation
	2025	2026	2027	2028	2029

Employment Category	New Full Time Jobs Created	Avg Hourly Wage	New Full Time Jobs Created	Avg Hourly Wage	New Full Time Jobs Created	Avg Hourly Wage	New Full Time Jobs Created	Avg Hourly Wage	New Full Time Jobs Created	Avg Hourly Wage	Total New Jobs to SC
Managerial		\$ -		\$ -		\$ -	1	\$ 60.00		\$ -	
Professional		\$ -		\$ -		\$ -		\$ -		\$ -	
Technical		\$ -		\$ -	1	\$ 40.00		\$ -		\$ -	
Sales	1	\$ 48.00	1	\$ 48.00	1	\$ 48.00	1	\$ 50.00		\$ -	
Clerical	1	\$ 23.00	1	\$ 25.00		\$ -	1	\$ 25.00		\$ -	
Craftsman (skilled)		\$ -		\$ -		\$ -		\$ -		\$ -	
Operators (semi-skilled)		\$ -		\$ -	1	\$ 25.00		\$ -		\$ -	
Laborers (unskilled)		\$ -	1	\$ 16.00	1	\$ 17.00	1	\$ 18.00		\$ -	
Service		\$ -		\$ -		\$ -		\$ -		\$ -	
		\$ -		\$ -		\$ -		\$ -		\$ -	Total New Jobs to SC
		\$ -		\$ -		\$ -		\$ -		\$ -	
		\$ -		\$ -		\$ -		\$ -		\$ -	
New Job Creation to Date and Avg. Weekly Wage	2	\$ 35.50	3	\$ 29.67	4	\$ 32.50	4	\$ 38.25	0	\$ -	13

Estimated Jobs Relocated to New Facility		
<i>Jobs are full time employees of the Company</i>		
Employment Category	Full Time Jobs	Avg Annual Wage
		\$ -
		\$ -

Estimated Utility Requirements (or increase if expansion):	
Water	no manufacturing, only common office use
Sewer	no manufacturing, only common office use
Electric	close to zero, plan to adding solar panels to building
Gas	NA
Use of Port?	No

Benefits - Please provide a brief description of the benefit package offered to employees in the area below. Please include percentage paid by employer.
401K with company match (100% on the first 1% of pay and then 50% on the next 2nd % to 6% for a 3.5% Max.), We want to add health insurance shortly and possibly dental and vision in 2025 or 2026.

Briefly describe the financing structure for this project.
HQ funding from holding in Switzerland

STATE OF SOUTH CAROLINA        )  
  )  
COUNTY OF BEAUFORT                )

THIS AGREEMENT dated the \_\_\_\_ day of \_\_\_\_\_ 2025, is between the Town of Bluffton, S.C., a municipal corporation with offices at 20 Bridge Street, SC 29910 ("Town"), and CS Industries, LLC, ("Developer") a South Carolina limited liability corporation located at \_\_\_\_\_.

**BACKGROUND STATEMENT**

One of the primary missions of the Town is to encourage economic development and thereby improve the tax base and enhance the livability of the Bluffton area.

In September 12, 2023, the Bluffton Town Council adopted an Ordinance (“the Ordinance”) establishing an economic development incentive plan. The Ordinance was codified as Article VI within Chapter 6 – Businesses and Business Regulations, and is incorporated herein by reference.

The Developer intends to acquire commercial property located at Pinellas Drive; the property is within the Town limits and within the Incentive Area identified in the Ordinance.

The Developer has requested an economic incentive grant from the Town in return for the Developer's agreement to develop commercial space in Town and locate up to ten thousand (11,000) square feet of commercial space to be used for an eligible use as outlined in the Ordinance.

Revenues from business licenses, stormwater fees, building permits and property taxes are estimated to exceed \$116,000 in a five-year period. There is also an estimate that the development will create an additional thirteen jobs.

Based upon the foregoing, the Town Council of the Town of Bluffton has determined that the mission of the Town to encourage economic development will be enhanced by the completion of the Developer's project.

**STATEMENT OF AGREEMENT**

1. In consideration of the mutual representations, warranties, covenants and agreements contained herein, the parties hereto agree as follows:
2. The Developer will designate up to 11,000 square feet of commercial space dedicated for uses eligible in the Ordinance. The Developer will establish an operation in the Town on or before December 30, 2025 that complies with the definition of eligible uses as referenced in the Ordinance. If the Developer cannot find suitable business occupants within the eligible uses, they must inform the Town in writing of their intent to expand the search, and all potential business occupants must fall within the uses identified in the

Ordinance, Section 6-145(a)(5) or the grant award may be amended in accordance with the Ordinance, Section 6-146(c)(3).

3. The Town will pay the Developer a grant based on the increase in fees and business licenses. The grant will be provided over a five-year period on the 1<sup>st</sup> of the month in which the business opens and on such date each subsequent year, contingent upon a certificate of occupancy being issued to an occupant who fits the definition of eligible use in the Ordinance. The grants will be percentage based on the increase in values over the bases established for each of the below categories for the following percentages.

	Year 1	Year 2	Year 3	Year 4	Year 5
Permit Fees	50%	-	-	-	-
BJWSA	100%				
Business License	50%	50%	50%	50%	50%
Bluffton Property Taxes	50%	50%	50%	50%	50%

The Business License amount will be set based on the amount paid at the time of issuing their building permit and subsequently on their paid renewal application amount that covers an entire twelve-month operation period. The permit fees will be based on the fees paid for work done prior to the Certificate of Occupancy and initial Business License of any tenants being issued.

4. The total amount of the grant shall not be greater than the direct value received by the Town and delivered from the capital investment during the contribution period.
5. The benchmarks, measures and reporting for this Agreement shall be:

Benchmark	Measure	Reporting
Target industries	Headquarters; in the alternative, provide notice of expansion to all target industries in the Ordinance	Provision of tenant’s business license with the Town of Bluffton.
Total project investment	\$3,600,000.	Budget spreadsheet with accompanying invoices and proof of payment.
Property valuation		

6. Notifications shall be addressed:
- a) To Developer:  
Martin Zeller  
CS Instruments USA Inc., LLC
  - b) To Town:  
Town Manager  
Town of Bluffton  
20 Bridge Street

Bluffton, SC 29910

7. The Background Statement above is included in the terms of this agreement. The terms and conditions of the Ordinance are incorporated by reference.

**IT IS SO AGREED** as of the date above first written.

**CS Instruments USA Inc., LLC**

**Town of Bluffton, South Carolina**

By:\_\_\_\_\_

By:\_\_\_\_\_

Its:\_\_\_\_\_

Its:\_\_\_\_\_



Attachment 6

Recommended Motion

Consideration of An Ordinance Authorizing an Economic Development Incentive Agreement between the Town of Bluffton and CS Industries, LLC – David Nelems, DRCI CEO

**“I make a motion to approve second and final reading of an Ordinance Authorizing an Economic Development Grant Incentive Agreement between the Town of Bluffton and CS Industries, LLC for the development of 11,000 square feet of Space For Their U.S. Region Headquarters on Pinellas Drive in Bluffton.”**

TOWN COUNCIL

STAFF REPORT  
Projects and Watershed Resilience Department



MEETING DATE:	January 14, 2025
PROJECT:	Approval to Authorize a Task Authorization to McCormick Taylor, Inc. to Develop Wetland and Resilience Ordinances (Fiscal Impact: \$174,004.55)
PROJECT MANAGER:	Kimberly Washok-Jones, Director of Projects and Watershed Resilience

**REQUEST:** The May River Watershed Action Plan Advisory Committee (WAPAC) and Staff request Town Council authorize the Town Manager to issue a Master Service Agreement (MSA Contract #2021-56) Task Authorization to McCormick Taylor, Inc. to develop Town Wetland and Resilience Ordinances to protect health, life, and safety of our citizens and natural resources.

The scope of work shall generally include:

1. Review current Town policies,
2. Identify and inventory wetlands within the Town’s jurisdiction,
3. Develop a map of wetlands to be protected,
4. Develop a Wetland Ordinance for the Town,
5. Apply comprehensive drainage study results to map resiliency zones,
6. Identify primary conveyance systems, and
7. Develop a Resilience Ordinance for the Town.

The total fiscal impact is \$174,004.55 and is within the Fiscal Year (FY) 2025 budget. The Wetland and Resilience Project Scope (Attachment 2) outlines the tasks and deliverables for the project.

**BACKGROUND:** The Town of Bluffton’s Comprehensive Plan *Blueprint Bluffton*, adopted November 8, 2022, recommends developing “a Climate Adaptation and Sustainability Plan for the Town” (p. 84) to mitigate and adapt to a changing climate. The FY 2025 – 2026 Strategic Plan includes developing a Resiliency Plan focused on the Town’s natural resources, sustainability, wetland ordinance/restoration, and environmental principles. At their December 5, 2024, meeting, WAPAC unanimously approved a recommendation to Town Council to develop both Wetland and Resilience Ordinances in FY25 and a Wetland Restoration Program in FY26.

*This space left intentionally blank.*

**Wetland Ordinance need:**

Wetlands, also commonly known as bogs, bayous, marshes, or swamps, are vital for protecting water quality and aquatic ecosystems. They also help control flooding and can be an important economic source for communities.

Certain wetlands that fall within the scope of the federal Clean Water Act (CWA) are protected by permitting programs managed by the U.S. Environmental Protection Agency (EPA) and the U.S. Army Corps of Engineers (ACOE). Complex legal battles over the EPA and ACOE's wetland definition have occurred since 2015. In May 2023, the U.S. Supreme Court's *Sackett* decision changed the regulatory landscape for millions of acres of wetlands previously understood to fall within the scope of the CWA. Many of the wetlands that the ACOE previously determined were jurisdictional are no longer entitled to federal protection. These wetlands are now left vulnerable to development/impacts unless they are protected by state or local law. Currently, wetland regulations in South Carolina are limited and the Town has no wetland protection ordinance.

The South Carolina Department of Natural Resources (SCDNR) provided the Town with the *May River Watershed Preliminary Landcover Assessment Report* (Attachment 3) in November 2024. This report quantifies land use changes in the May River Watershed since 2001 and states, "...woody wetlands decreased from 26.3% to 23.6% (4,820 to 4,307 acres) from 2001 to 2021," representing a loss of 513 acres of wetlands.

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.

**Resilience Ordinance need:**

Since FY22, the Town has been completing Comprehensive Drainage Studies. The Heyward Cove Watershed study was completed in October 2023 and serves as a model for all other Comprehensive Drainage Studies. These studies identify future stormwater Capital Improvement Program (CIP) projects to accommodate higher intensity rainfall patterns and inundation areas (areas that are flooded and store water during a storm event) for 25-, 50-, and 100-year storm events. These inundation areas allow the Town to pinpoint areas or zones that may require additional protection measures for resilience.

**NEXT STEPS:**

- Approval of MSA Task Authorization.
- Schedule a project kick-off meeting with consultants and stakeholders.

**SUMMARY:** This project originated from the recent U.S. Supreme Court’s *Sackett* decision, which restricts federal wetland protections. There are limited state protections and no Town wetland protection ordinance currently.

The Town of Bluffton’s Comprehensive Plan and FY 2025 – 2026 Strategic Plan include developing a Resiliency Plan. Developing this plan is supportive of the following guiding principles of the Town:

- May River & Surrounding Rivers and Watersheds Guiding Principle #1. Support initiatives, such as the May River Watershed Action Plan, to improve water quality of the May, Okatie/Colleton and New Rivers and their watersheds.
- May River & Surrounding Rivers and Watersheds Guiding Principle #2. Seek collaboration and partnerships that protect and improve the May, Okatie/Colleton and New Rivers and their watersheds.
- May River & Surrounding Rivers and Watersheds Guiding Principle #4. Support active planning and management for resilience of natural resources and our response to weather events, future disasters and changing environmental conditions.

Consistent with these Guiding Principles, WAPAC and Staff recommend Town Council authorize the Town Manager to issue a MSA Contract 2021-56 Task Authorization to McCormick Taylor, Inc. for critical wetland and resilience data gathering and analysis to develop two (2) ordinances (Wetland and Resilience) for adoption by the Town.

**ATTACHMENTS:**

1. Presentation
2. Wetland and Resilience Project Scope
3. SCDNR *May River Watershed Preliminary Landcover Assessment Report*
4. Proposed Motion

# **Approval to Authorize a Task Authorization to McCormick Taylor, Inc. to Develop Wetland and Resilience Ordinances (Fiscal Impact: \$174,004.55)**

**Presentation to Town Council**

**January 14, 2025**

**Department of Projects & Watershed Resilience**

**Kimberly Washok-Jones, Director of Projects and  
Watershed Resilience**

# Request



- The May River Watershed Action Plan Advisory Committee (WAPAC) and Staff request Town Council authorize the Town Manager to issue a Master Service Agreement (MSA Contract #2021-56) Task Authorization to McCormick Taylor, Inc. for \$174,004.55 to:
  1. Review current Town policies,
  2. Identify and inventory wetlands within the Town's jurisdiction,
  3. Develop a map of wetlands to be protected,
  4. Develop a Wetland Ordinance for the Town,
  5. Apply comprehensive drainage study results to map resiliency zones,
  6. Identify primary conveyance systems, and
  7. Develop a Resilience Ordinance for the Town.



# *Wetland and Resilience Background*

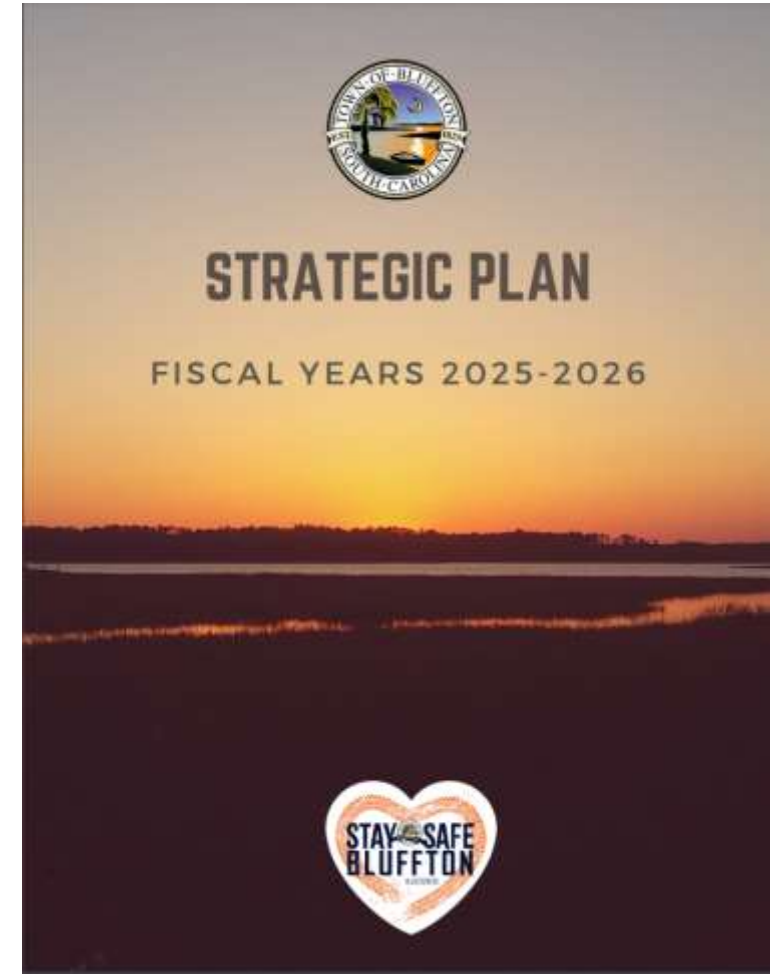


- At their December 5, 2024, meeting, WAPAC unanimously approved a recommendation to Town Council to initiate developing both Wetland and Resilience Ordinances in FY25 and a Wetland Restoration Program in FY26.
- The total fiscal impact for critical wetland and resilience data gathering and analysis to develop two (2) ordinances for adoption by the Town is \$174,004.55 and is within the FY25 budget.
- The Wetland and Resilience Project Scope (Attachment 2) outlines the tasks and deliverables for the project.

# Introduction



- Wetlands are vital for:
  1. Protecting water quality and aquatic ecosystems. They also help control flooding and can be an important economic source for communities.
  2. The Town of Bluffton's Comprehensive Plan, *Blueprint Bluffton*, recommends developing "a Climate Adaptation and Sustainability Plan for the Town" (p. 84) to mitigate and adapt to a changing climate.
  3. The FY 2025 – 2026 Strategic Plan includes developing a Resiliency Plan focused on the Town's natural resources, sustainability, wetland ordinance and restoration and environmental principles.



Town of Bluffton FY25-26 Strategic Plan Cover

# Wetland Ordinance Need



- Certain wetlands within the scope of the Clean Water Act (CWA) are protected by the U.S. Environmental Protection Agency (EPA) and the U.S. Army Corps of Engineers (ACOE) permitting authority.
- Complex legal battles over the EPA and ACOE's wetland definition have occurred since 2015.
- In May 2023, the U.S. Supreme Court's *Sackett* decision affected millions of acres of wetlands previously understood to fall within the scope of the CWA.
- Many wetlands that the ACOE previously determined were jurisdictional are no longer entitled to federal protection leaving them vulnerable to development/impacts, unless they are protected by state or local law.
- Currently, wetland protection regulations in South Carolina are limited and the Town has no wetland protection ordinance.



Forested Wetland in Bluffton during  
Tropical Storm Debbie

# Wetland Ordinance Need (Cont.)



- The South Carolina Department of Natural Resources' (SCDNR) *May River Watershed Landcover Assessment Report* quantifies land use changes in the May River Watershed since 2001 and states, "...woody wetlands decreased from 26.3% to 23.6% (4,820 to 4,307 acres) from 2001 to 2021," representing a loss of 513 acres of wetlands.
- Information and mapping 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.

# Resilience Ordinance Need



- Since FY22, The Town has been completing Comprehensive Drainage Studies.
- The Heyward Cove Watershed Study was completed in October 2023 and serves as a model for all other Comprehensive Drainage Studies.
- These studies identify future stormwater Capital Improvement Program (CIP) projects to accommodate higher intensity rainfall patterns and inundation areas (areas that are flooded and store water during a storm event) for 25-, 50-, and 100-year storm events.
- These inundation areas allow the Town to pinpoint areas or zones that may require additional protection measures for resilience.

# Recommendation



WAPAC and Staff recommend Town Council authorize the Town Manager to issue a MSA Contract 2021-56 Task Authorization to McCormick Taylor, Inc. for critical wetland and resilience data gathering, analysis and development of two (2) ordinances (Wetland and Resilience Ordinances) for adoption by the Town.



# *Next Steps*



- Following Council approval of the Task Authorization, staff will schedule a project kick-off meeting with the consultants and stakeholders.



# ***QUESTIONS & DISCUSSION***

## *Proposed Motion*

*“I move to **approve** authorizing the Town Manager to issue a Task Authorization to McCormick Taylor, Inc. to develop Town Wetland and Resilience Ordinances with a fiscal impact of \$174,004.55.”*

Wetland & Resilience Ordinances Project Scope		
Tasks		Cost Per Task
<b>Pre-Task</b>	<b>Kickoff</b>	
1	Kickoff Meeting (In Person)	
<b>Cost to Complete:</b>		<b>\$8,560.00</b>
<b>Task 1</b>	<b>Review Local Policies</b>	
1.1	Town of Bluffton Unified Development Ordinance (UDO)	
1.2	Heyward Cove Drainage Study Final Report	
1.3	SC Sea Grant Resiliency Analysis Scope of Work & Outcomes	
1.4	Town of Bluffton Stormwater Design Manual	
MTG	Task 1 Meetings (2 Virtual)	
<b>Cost to Complete:</b>		<b>\$13,535.00</b>
<b>Task 2</b>	<b>Wetlands Considerations, Components, and Proposed Inclusions</b>	
2.1	Review SC Environmental Law Project (SCELP) Model Wetland Ordinance	
2.2	Wetland Identification	
2.3	Define and Inventory Town Wetland Areas	
2.4	Map Town Wetland Areas to be Protected	
2.5	Assist in Developing Draft and Final Wetland Ordinance for Adoption by the Town	
MTG	Task 2 Meetings	
<b>Cost to Complete:</b>		<b>\$72,715.00</b>
<b>Task 3</b>	<b>Resilience Ordinance, Components and Considerations</b>	
3.1	Resilience Ordinance	
3.2	Comprehensive Drainage Heyward Cove Study Findings and Proposed Inclusions	
3.3	Primary Conveyance Systems	
3.4	Mapping of "Resilience Zone"	
MTG	Task 3 Meetings (2 Virtual)	
<b>Cost to Complete:</b>		<b>\$45,335.00</b>
<b>Task 4</b>	<b>Deliverables</b>	
MTG	Task 5 Meetings with Town (5) and Final Reports	
<b>Cost to Complete:</b>		<b>\$5,660.00</b>
<b>Task 5</b>	<b>Project Management</b>	
MTG	Monthly Update Meetings (18, 1HR, Virtual)	
MTG	Monthly Progress Reports (12)	
<b>Cost to Complete:</b>		<b>\$27,285.00</b>
.	Costs Other Than Payroll	<b>\$914.55</b>
<b>Total Project Costs</b>		<b>\$174,004.55</b>

May River Watershed Preliminary Land Cover Assessment Report

Andrew Tweel

Environmental Research Section, South Carolina Department of Natural Resources

November 2024

Introduction

At the request of the Town of Bluffton, SCDNR is providing some summaries of land cover datasets that summarize how development patterns, freshwater wetlands, and other related factors have changed over the last 20 years. These summaries will include spatial data to show where this has occurred, as well as graphs and tabular summaries to show changes over time.

Methods

The following data layers were assembled in ArcGIS Pro and analyzed using Town-provided boundaries for watershed basins (SUBBASINS\_WTRSHED.shp, provided to SCDNR November 2024). Spatial data was obtained from the Multi-resolution Land Characteristics Consortium (MRLC- National Land Cover Dataset), US Census Bureau, and SCDNR. To this file, basin areas were calculated in acres, and a unique ID was assigned to each basin. For the purposes of calculating percentage of impervious cover, the US National Wetlands Inventory dataset was used to remove estuarine and marine habitats (i.e. protected areas). The remaining basin areas would then, by definition, constitute developable land. A second layer was created by merging all of the smaller basins into one file representing the watershed as a whole.

Data Layer	Purpose	Years
National Land Cover Dataset (NLCD)	Land cover classes (e.g. forested wetlands)	2001, 2004, 2006, 2008, 2011, 2013, 2016, 2019, 2021
NLCD Impervious Cover Dataset	Impervious cover percentages	2001, 2004, 2006, 2008, 2011, 2013, 2016, 2019, 2021
US Census	Population density data	2000, 2010, 2020
Stormwater Ponds (SCDNR)	Area of stormwater ponds	2013, 2021

Areas of land cover were calculated as percentages and acreage of developable areas (i.e. excluding estuarine wetlands and estuarine surface waters). Impervious cover was averaged at the basin level for developable pixels. Stormwater pond area was summarized by basin for both data years. Census data was prorated using the *Apportion* tool to proportionally apply a given census block’s population to the basins.

## Results

Satellite-derived datasets help quantify the changes in various metrics associated with development patterns that have occurred in the May River watershed since 2001. Population increases were associated with increases in developed land cover classes, associated impervious cover and stormwater ponds, and decreases in vegetated land cover classes and wetlands. Total watershed population increased over four fold during the study period, from 5,934 people in 2000 to 18,242 in 2010, and to 26,363 in 2020. Similarly, population density increased from a basin-level average of 0.32 people per acre in 2000 to 1.19 people per acre in 2020.

The highest development classes (NLCD High and Medium Intensity) increased from 1.4% in 2001 to 7.9% in 2021 (258 to 1,444 acres). Adding in the lower intensity classes (NLCD Low and Open Development), these percentages increased from 16.9% in 2001 to 35.6% in 2021. Concurrently, there was a loss of vegetated land cover classes, which decreased from 80.6% to 61.2% during that same period (14,732 acres to 11,200 acres). Within that class, woody wetlands decreased from 26.3% to 23.6% (4,820 to 4,307 acres) from 2001 to 2021, representing a loss of 513 acres of forested wetland habitat.

Impervious cover, a derived metric representing surfaces that do not allow for the infiltration of precipitation, also changed dramatically throughout the area. Overall, developable land impervious cover increased from 2.54% to 9.62% from 2001 to 2021. Within basins, these differences were potentially much greater. On average, this increase was 6.09% ( $\pm 0.65$  s.e.) per basin (note: this is different from the overall totals because of differences in basin area that are accounted for in the overall total). The greatest impervious cover among all the basins is 48% as of 2021. In the context of previously-established thresholds that relate to various levels of degradation of downstream habitats (Holland et al. 2004), 63 of the 208 basins contain greater than 10% impervious cover, 29 contain greater than 20% impervious cover, and 14 contain greater than 30% impervious cover.

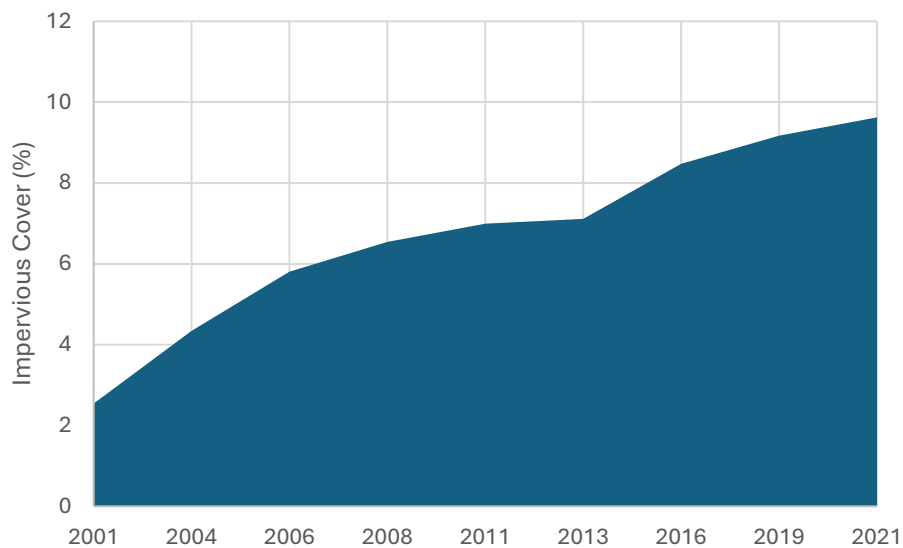
Stormwater ponds represent an areal coverage of 912.2 acres and 352 ponds as of 2021. In 2013, there were 820.1 acres of pond coverage and 298 ponds. These areas were hand digitized from aerial imagery at a coast-wide scale and are likely not as accurate as any development or permit-level spatial data.

Comparing between datasets, percent impervious cover is strongly negatively correlated with woody wetland percent cover ( $r^2 = 0.962$ ), indicating that the decline in woody wetland cover corresponds linearly to the increase in percent impervious cover.

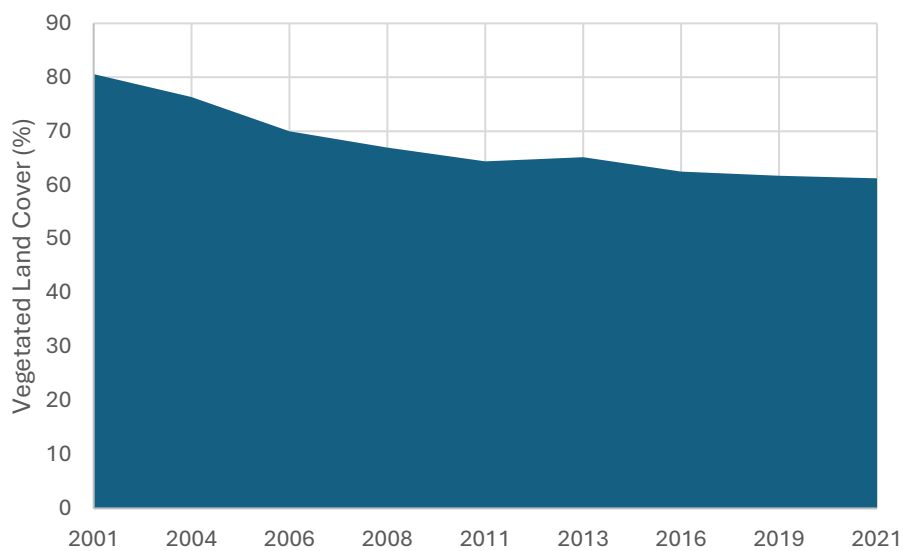
## References

- MRLC. Multi-resolution Land Characteristics Consortium.  
[https://www.mrlc.gov/data?f%5B0%5D=project\\_tax\\_term\\_term\\_parents\\_tax\\_term\\_name%3ALegacy%20NLCD&f%5B1%5D=region%3Aconus&f%5B2%5D=region%3Anorth%20america](https://www.mrlc.gov/data?f%5B0%5D=project_tax_term_term_parents_tax_term_name%3ALegacy%20NLCD&f%5B1%5D=region%3Aconus&f%5B2%5D=region%3Anorth%20america)
- Holland, A.F., Sanger, D.M., Gawle, C.P., Lerberg, S.B., Santiago, M.S., Riekerk, G.H., Zimmerman, L.E. and Scott, G.I., 2004. Linkages between tidal creek ecosystems and the landscape and demographic attributes of their watersheds. *Journal of Experimental Marine Biology and Ecology*, 298(2), pp.151-178.

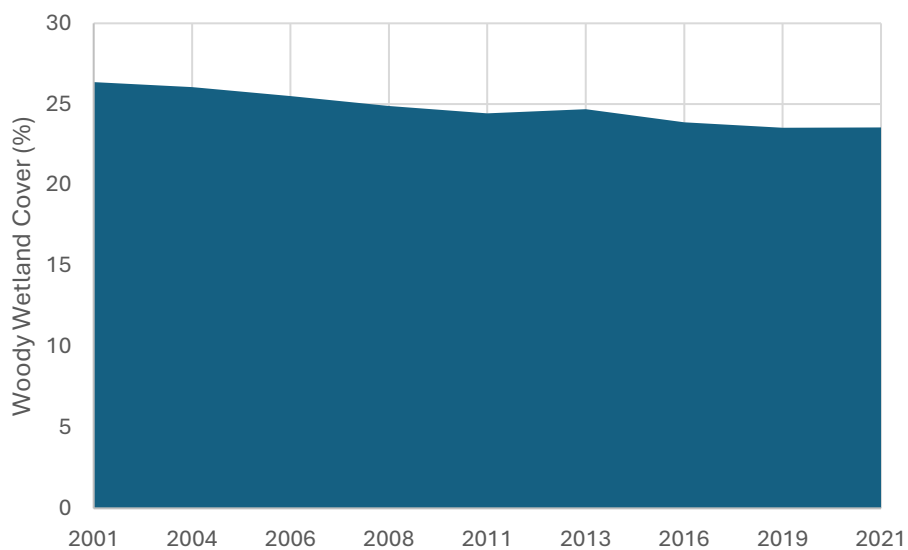




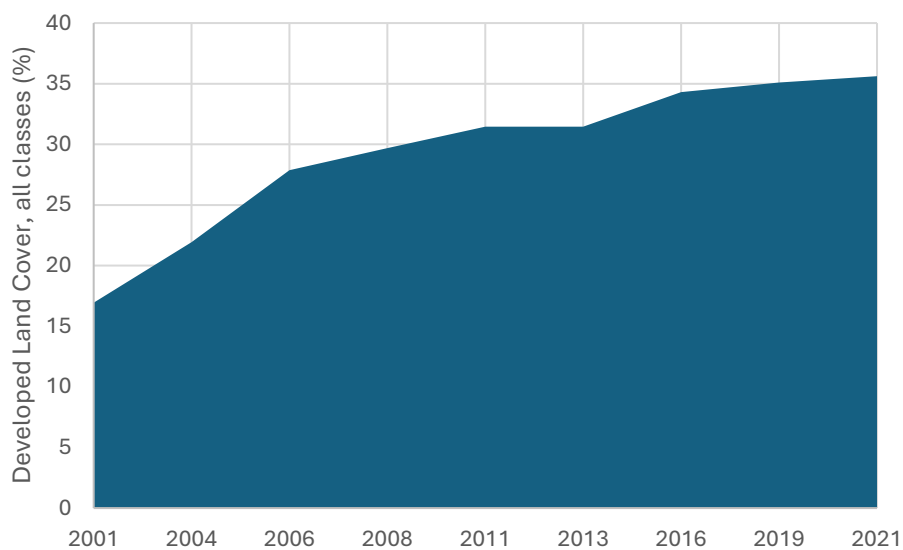
Graph of the change in impervious cover percent between 2001 and 2021, derived from NLCD data.



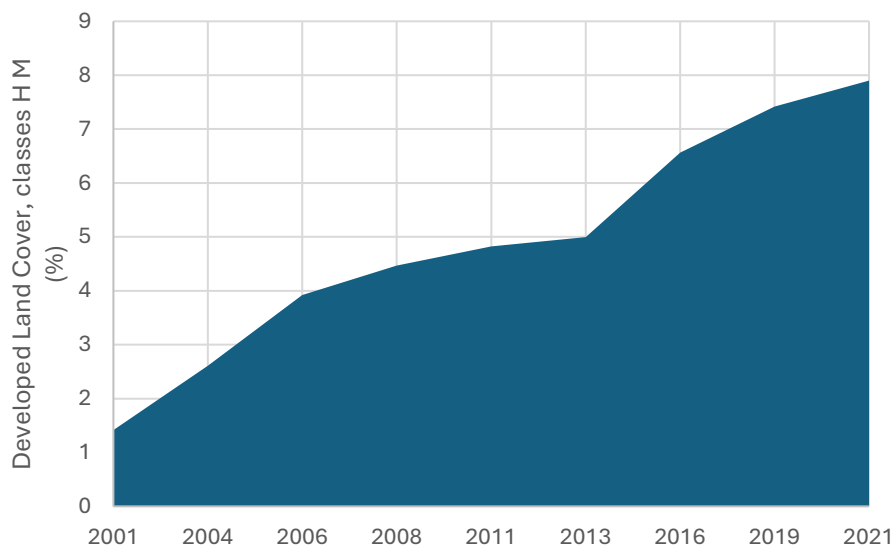
Graph of the change in vegetated land cover percent between 2001 and 2021, derived from NLCD data.



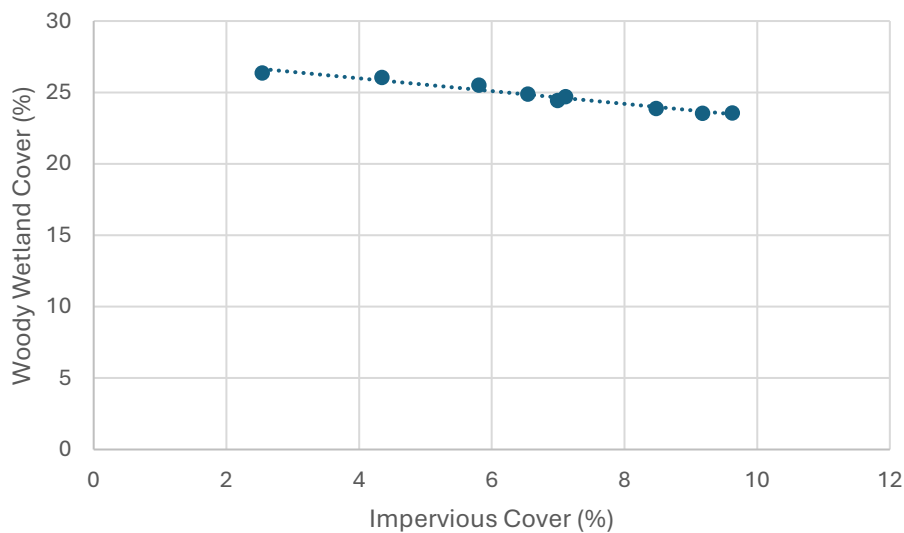
Graph of the change in woody wetland cover percent between 2001 and 2021, derived from NLCD data.



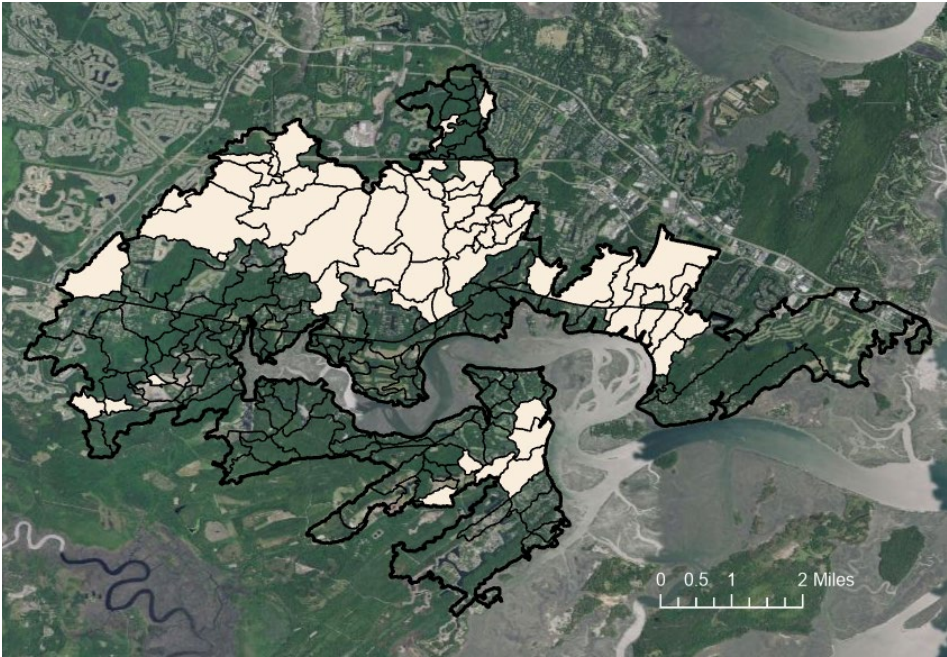
Graph of the change in developed land class cover percent between 2001 and 2021, derived from NLCD data.



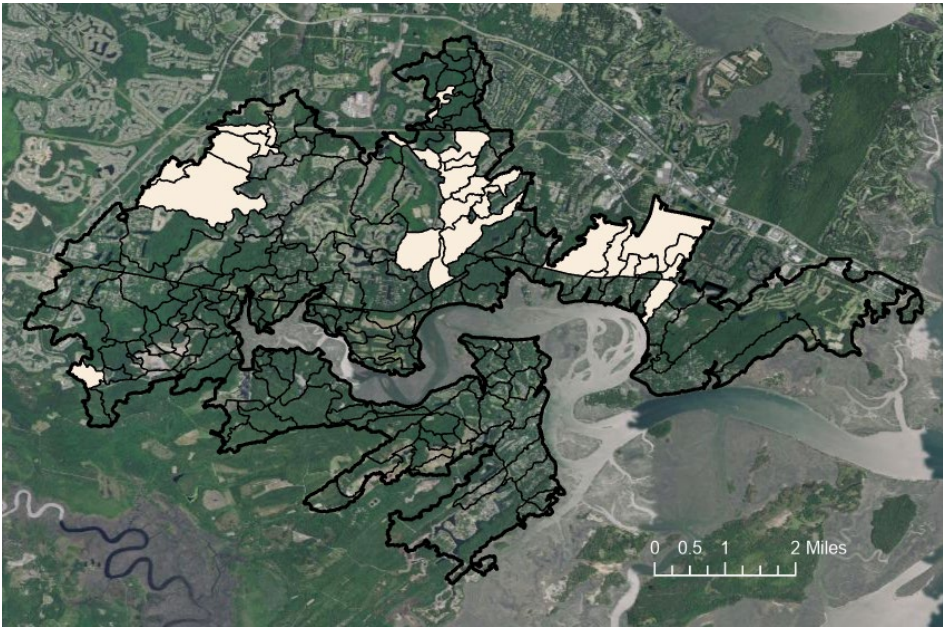
Graph of the change in developed land class cover (high and medium only) percent between 2001 and 2021, derived from NLCD data.



Graph of relationship between impervious cover percent and woody wetland cover percent using data from NLCD between 2001 and 2021.

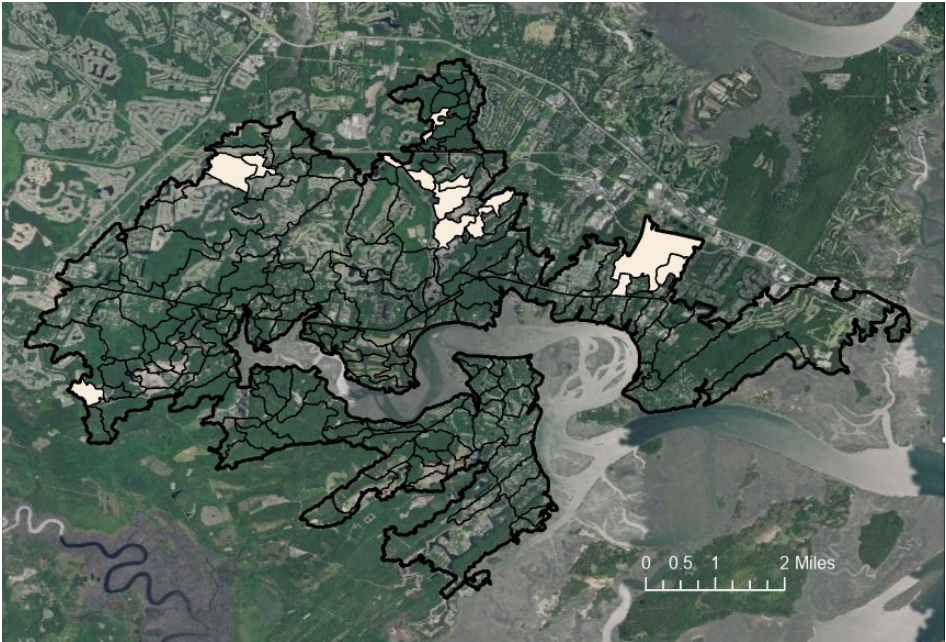


Map of watershed basins exceeding the 10% threshold of impervious cover, derived from 2021 NLCD data.

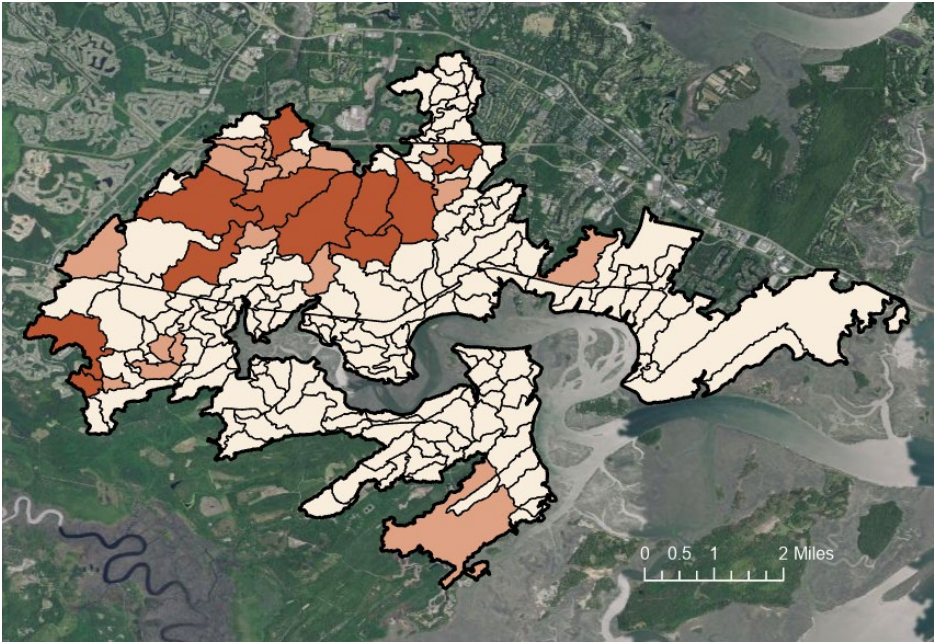


Map of watershed basins exceeding the 20% threshold of impervious cover, derived from 2021 NLCD data.



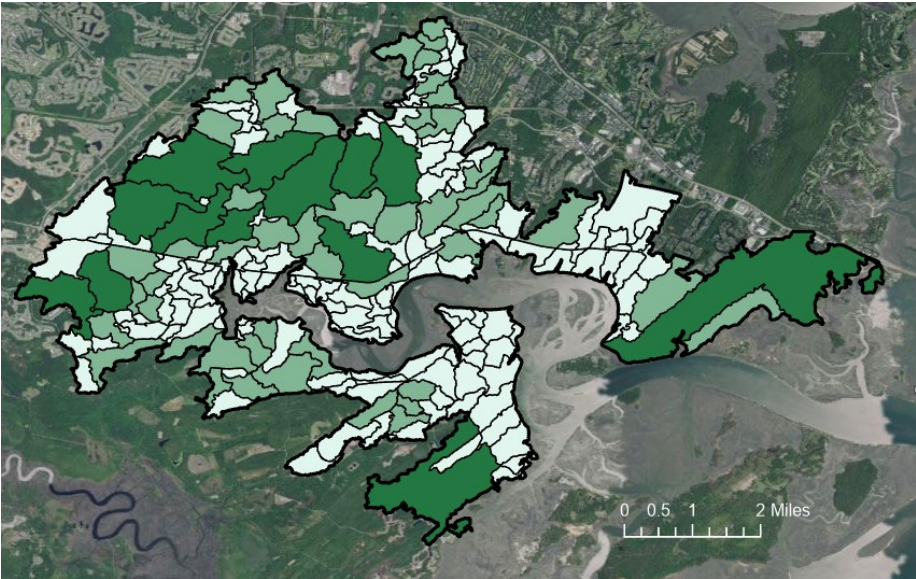


Map of watershed basins exceeding the 30% threshold of impervious cover, derived from 2021 NLCD data.

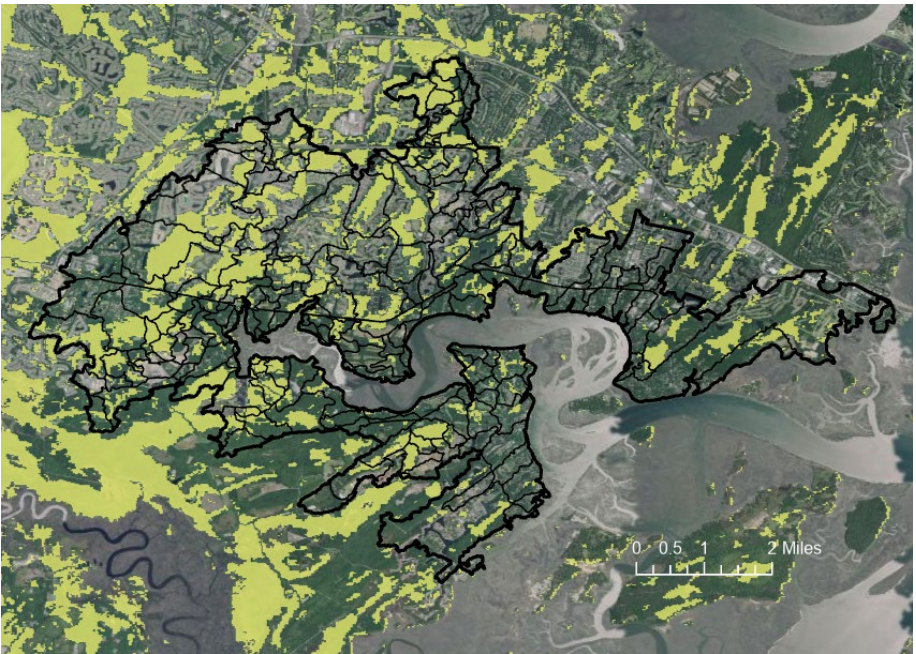


Map of acreage loss of woody wetlands between 2001 and 2021 derived from NLCD. The lightest shading indicates 0-4 acres lost, the medium shading indicates 4-16 acres lost, and the darkest shading indicates over 16 acres lost (maximum 55 acres lost).





Map of woody wetland acreage in 2021 derived from NLCD. The lightest shading indicates 0-22 acres, the medium shading indicates 22-76 acres, and the darkest shading indicates over 76 acres (maximum 200 acres).



Map of classified woody wetlands in the 2021 NLCD dataset.

Attachment 4  
Proposed Motion

Approval to Authorize a Task Authorization to McCormick Taylor, Inc. To Develop Wetland and Resilience Ordinances (Fiscal Impact - \$174,004.55)

Proposed Motion

*"I move to **approve** authorizing the Town Manager to issue a MSA Task Authorization to McCormick Taylor, Inc. to develop Town Wetland and Resilience Ordinances with a fiscal impact of \$174,004.55."*





**TOWN COUNCIL  
STAFF REPORT  
Department of Finance & Administration**

<b>MEETING DATE:</b>	January 14, 2025
<b>PROJECT:</b>	Consideration of an Ordinance Amending the Town of Bluffton FY 2025 Budget to Provide for the Expenditures of Certain Funds and to Allocate Sources of Revenue for the Said Funds – First Reading
<b>PROJECT MANAGER:</b>	Natalie Majorkiewicz, CGFO, CGFM, Director of Finance

**RECOMMENDATION:**

Town Council approve the proposed ordinance amending the FY 2025 budget by increasing the General Fund budget by \$533,250 increasing the business license budget by \$500,000 to transfer out to Capital Improvements Project Fund for Land Acquisition and using prior year fund balances of Capital Asset Reserve for \$9,250 and Tree Remediation for \$24,000. The total proposed budget amendment is \$1,033,250 and will bring the FY 2025 total consolidated budget to \$103,999,988.

**BACKGROUND:**

In FY2025, revenues for business licenses are projected to be higher than budgeted by approximately \$500,000. Proposed uses of fund balance included in this budget amendment are described below.

**General Fund** - This Budget Amendment includes an increase to the General Fund budget by \$533,250 to reflect an increase of \$500,000 in business license revenues for Land Acquisition in Transfers Out to Capital Improvements Program Fund, \$9,250 from the Capital Asset Reserve Fund to purchase a dump trailer to assist with identified tree removal from surveys and \$24,000 from the Tree Remediation Fund for additional tree survey services in right of way locations.

**Local Hospitality Tax Fund** – This budget amendment maintains the budget at \$8,737,556.

**Local Accommodations Tax Fund** – This budget amendment maintains the budget at \$2,799,967.

**Stormwater Fund** – This budget amendment maintains the budget at \$4,154,285.

**Capital Improvements Program Fund (CIP)** – This budget amendment includes an increase to the CIP budget by \$500,000 to Transfers In from General Fund for Land Acquisition by \$500,000.

**Debt Service Fund** – This budget amendment maintains the budget at \$10,452,166.

**ATTACHMENTS:**

1. Ordinance
  - Attachment A: General Fund Budget
  - Attachment B: Local Hospitality Tax Fund Budget
  - Attachment C: Local Accommodations Tax Fund Budget
  - Attachment D: Stormwater Fund Budget
  - Attachment E: Capital Improvements Program Fund Budget
  - Attachment F: Debt Service Fund Budget
2. Council Motion Recommendation

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

TO AMEND THE BUDGET FOR THE TOWN OF BLUFFTON, SOUTH CAROLINA, FOR THE FISCAL YEAR  
ENDING JUNE 30, 2025;  
TO PROVIDE FOR THE EXPENDITURES OF CERTAIN FUNDS;  
AND TO ALLOCATE THE SOURCES OF REVENUE FOR THE SAID FUNDS.

**WHEREAS**, Section 5-7-260 of the Code of Laws of South Carolina requires that a municipal council act by ordinance to adopt a budget and levy taxes, pursuant to public notice; and

**WHEREAS**, the Town Council did adopt the Budget Ordinance 2024-11 on June 11, 2024; and

**WHEREAS**, the Town Council did adopt Ordinance 2024-32 on October 08, 2024 amending the fiscal year 2025 budget; and

**WHEREAS**, pursuant to Sections 4 and 5 of said budget, the Town Council is desirous of amending the budget so as to provide for budget appropriations for legal encumbrances and certain other commitments from the Fund Balance and other revenues of Fiscal Year 2025; and

**WHEREAS**, pursuant to Sections 4 and 5 of said budget, the Town Council is desirous of amending the budget so as to provide for additional program appropriations from available fund balance and assigning funds for projects not yet established; and

**NOW, THEREFORE, BE IT ORDERED AND ORDAINED BY THE TOWN COUNCIL OF THE TOWN OF BLUFFTON, SOUTH CAROLINA; AND IT IS ORDAINED BY THE AUTHORITY OF THE SAID TOWN COUNCIL:**

**SECTION 1. AMENDMENT**

The revised fiscal year 2025 budget is amended to make the following changes and additions to the funds from prior year and to the projected revenue and expenditure accounts as follows:

**General Fund**

Revenues and Other Sources

License & Permits

Business Licenses	\$ 500,000
-------------------	------------

Transfers In

Prior Year Fund Balance-Tree Mitigation Fund	24,000
--	--------

Total Revenues and Other Sources	<u>\$ 533,250</u>
----------------------------------	-------------------

**General Fund (Cont.)**

Expenditures and Other Uses

Expenditures	
Public Services	\$ 33,250
Other Uses	
Transfer Out to CIP	500,000
Total Expenditures and Other Uses	<u>\$ 533,250</u>

**Capital Improvement Fund**

Revenues and Other Sources

Transfers In	
General Fund	\$ 500,000
Prior Year Fund Balance	-
Total Revenues and Other Sources	<u>\$ 500,000</u>

**Capital Improvement Fund (Cont.)**

Expenditures and Other Uses

Expenditures	
L0001-Land Acquisition	\$ 500,000
Total Expenditures and Other Uses	<u>\$ 500,000</u>

The effect of this amendment will be to increase the General Fund to \$35,719,115 (Attachment A), to maintain the Local Hospitality Tax at \$8,737,556 (Attachment B), to maintain the Local Accommodations Tax Fund at \$2,799,967 (Attachment C), to maintain the Stormwater Fund budget at \$4,154,285 (Attachment D), to increase the Capital Improvements Program Fund budget to \$41,589,524 (Attachment E), and to maintain the Debt Service Fund budget at \$10,999,541 (Attachment F), for a total Consolidated Budget of \$103,999,988.

**SECTION 2. SEVERABILITY**

If any section, phrase, sentence, or portion of this Ordinance is for any reason held invalid or unconstitutional by any court of competent jurisdiction, such portion shall be deemed a separate, distinct, and independent provision, and such holding shall not affect the validity of the remaining portions thereof.

**SECTION 3. EFFECTIVE DATE**

This Ordinance shall be effective upon its enactment by the Town Council for the Town of Bluffton.

**PASSED, APPROVED, AND ADOPTED BY THE COUNCIL FOR THE TOWN OF BLUFFTON ON THIS \_\_\_\_\_ DAY OF \_\_\_\_\_, 2025.**

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

ATTEST:

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

**Attachments:**

- A. General Fund Budget
- B. Local Hospitality Tax Fund Budget
- C. Local Accommodations Tax Fund Budget
- D. Stormwater Utility Fund Budget
- E. Capital Improvements Program Fund Budget
- F. Debt Service Fund Budget

First Reading: January 14, 2025

Second and Final Reading:



**Town of Bluffton  
General Fund Budget**

Section X. Item #4.

	Adopted FY 2025 Budget	Budget Amendment #1	Budget Amendment #2	Proposed FY 2025 Budget
<b>Revenues</b>				
Property Taxes	\$ 10,017,780	\$ -	\$ -	\$ 10,017,780
Licenses & Permits				
Business Licenses	3,540,062	-	500,000	4,040,062
Franchise Fees	3,286,652	-	-	3,286,652
MASC Insurance Tax Collection	3,443,005	-	-	3,443,005
MASC Telecommunications	50,000	-	-	50,000
Building Safety Permits	1,686,595	-	-	1,686,595
Application Fees	50,000	-	-	50,000
Total Licenses & Permits	12,056,314	-	500,000	12,556,314
Grants and Entitlements	2,911,913	79,500	-	2,991,413
Intergovernmental	461,608	-	-	461,608
Service Revenues	492,860	-	-	492,860
Fines & Fees	115,000	-	-	115,000
Interest Income	300,000	-	-	300,000
Miscellaneous Revenues	185,915	144,963	-	330,878
<b>Total Revenues</b>	<b>26,541,390</b>	<b>224,463</b>	<b>500,000</b>	<b>27,265,853</b>
<b>Other Financing Sources</b>				
Transfers In				
Hospitality Tax	3,305,561	-	-	3,305,561
Capital Improvements Program Fund	-	-	-	-
Local Accommodations Tax	536,059	-	-	536,059
State Accommodations Tax	76,130	-	-	76,130
Stormwater Utility Fund	459,675	-	-	459,675
General Fund Prior Year Fund Balance	799,310	2,457,662	-	3,256,972
General Fund PYFB-ARPA	306,857	-	-	306,857
General Fund PYFB-Capital Asset Reserve	443,458	22,300	9,250	475,008
General Fund PYFB-Tree Remediation	-	13,000	24,000	37,000
Total Transfers In	5,927,050	2,492,962	33,250	8,453,262
<b>Total Other Financing Sources &amp; Transfers In</b>	<b>5,927,050</b>	<b>2,492,962</b>	<b>33,250</b>	<b>8,453,262</b>
<b>Total Revenues and Other Financing Sources</b>	<b>\$ 32,468,440</b>	<b>\$ 2,717,425</b>	<b>\$ 533,250</b>	<b>\$ 35,719,115</b>
<b>Expenditures</b>				
Building Safety	\$ 1,062,731	\$ -	\$ -	\$ 1,062,731
Communications & Community Outreach	939,738	-	-	939,738
Customer Service	300,141	-	-	300,141
Economic Development: DRCI	486,487	-	-	486,487
Executive	1,804,783	-	-	1,804,783
Finance & Administration	1,172,916	-	-	1,172,916
Human Resources	639,020	-	-	639,020
Information Technology	2,136,799	79,500	-	2,216,299
Municipal Judges	107,581	-	-	107,581
Municipal Court	500,485	-	-	500,485
Planning & Community Development	1,941,541	-	-	1,941,541
Police	11,923,480	240,900	-	12,164,380
Project Management	826,707	-	-	826,707
Public Services	3,097,840	13,000	33,250	3,144,090
Town Council	185,014	-	-	185,014
Town Wide	4,160,970	-	-	4,160,970
<b>Total Expenditures</b>	<b>31,286,233</b>	<b>333,400</b>	<b>33,250</b>	<b>31,652,883</b>
<b>Other Funding Uses</b>				
Contribution to Fund Balance	-	26,635	-	26,635
Transfers Out to Capital Improvements Program Fund	1,182,207	2,357,390	500,000	4,039,597
<b>Total Other Funding Uses</b>	<b>1,182,207</b>	<b>2,384,025</b>	<b>500,000</b>	<b>4,066,232</b>
<b>Total Expenditures and Other Funding Uses</b>	<b>\$ 32,468,440</b>	<b>\$ 2,717,425</b>	<b>\$ 533,250</b>	<b>\$ 35,719,115</b>



Town of Bluffton  
Local Hospitality Tax Fund Fund  
Special Revenue

Section X. Item #4.

	Adopted FY 2025 Budget	Budget Amendment #1	Budget Amendment #2	Proposed FY 2025 Budget
<b>Revenues</b>				
<b>Taxes</b>	\$ 4,120,747	\$ -	\$ -	\$ 4,120,747
<b>Interest Income</b>	20,000	-	-	20,000
<b>Total Revenues</b>	<u>4,140,747</u>	<u>-</u>	<u>-</u>	<u>4,140,747</u>
 <b>Other Financing Sources</b>	 -	 -	 -	 -
<b>Transfers In</b>				
Prior Year Fund Balance	4,108,119	488,690	-	4,596,809
<b>Total Other Financing Sources &amp; Transfers In</b>	<u>4,108,119</u>	<u>488,690</u>	<u>-</u>	<u>4,596,809</u>
 <b>Total Revenues and Other Financing Sources</b>	 <u>\$ 8,248,866</u>	 <u>\$ 488,690</u>	 <u>\$ -</u>	 <u>\$ 8,737,556</u>
 <b>Expenditures</b>				
<b>Other Funding Uses</b>				
Transfer to Capital Improvements Project Fund	4,943,305	488,690	-	5,431,995
Transfer to General Fund	3,305,561	-	-	3,305,561
<b>Total Transfers</b>	<u>8,248,866</u>	<u>488,690</u>	<u>-</u>	<u>8,737,556</u>
 <b>Total Expenditures and Other Funding Uses</b>	 <u>\$ 8,248,866</u>	 <u>\$ 488,690</u>	 <u>\$ -</u>	 <u>\$ 8,737,556</u>



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

Section X. Item #4.

	Adopted FY 2025 Budget	Budget Amendment #1	Budget Amendment #2	Proposed FY 2025 Budget
<b>Revenues</b>				
<b>Taxes</b>	\$ 1,337,930	\$ -	\$ -	\$ 1,337,930
<b>Interest Income</b>	5,000	-	-	5,000
<b>Total Revenues</b>	<u>1,342,930</u>	<u>-</u>	<u>-</u>	<u>1,342,930</u>
<b>Other Financing Sources</b>	-	-	-	-
<b>Transfers In</b>				
Prior Year Fund Balance	822,676	634,361	-	1,457,037
<b>Total Other Financing Sources &amp; Transfers In</b>	<u>822,676</u>	<u>634,361</u>	<u>-</u>	<u>1,457,037</u>
<b>Total Revenues and Other Financing Sources</b>	<u>\$ 2,165,606</u>	<u>\$ 634,361</u>	<u>\$ -</u>	<u>\$ 2,799,967</u>
<b>Expenditures</b>				
<b>Other Funding Uses</b>				
Transfer to Capital Improvements Project Fund	1,629,547	634,361	-	2,263,908
Transfer to General Fund	536,059	-	-	536,059
<b>Total Transfers</b>	<u>2,165,606</u>	<u>634,361</u>	<u>-</u>	<u>2,799,967</u>
<b>Total Expenditures and Other Funding Uses</b>	<u>\$ 2,165,606</u>	<u>\$ 634,361</u>	<u>\$ -</u>	<u>\$ 2,799,967</u>





**Town of Bluffton  
Stormwater Fund Budget**

Section X. Item #4.

	Adopted FY 2025 Budget	Budget Amendment #1	Budget Amendment #2	Proposed FY 2025 Budget
<b>Revenues</b>				
Stormwater Utility Fee	\$ 2,076,862	\$ -	\$ -	\$ 2,076,862
Licenses & Permits				
NPDES Plan Review and Inspection Fee	383,595	-	-	383,595
<b>Total Revenues</b>	<u>2,460,457</u>	<u>-</u>	<u>-</u>	<u>2,460,457</u>
<b>Other Financing Sources</b>				
Transfers In	-	-	-	-
Prior Year Fund Balance	1,557,214	136,614	-	1,693,828
<b>Total Other Financing Sources &amp; Transfers In</b>	<u>1,557,214</u>	<u>136,614</u>	<u>-</u>	<u>1,693,828</u>
<b>Total Revenues and Other Financing Sources</b>	<u>\$ 4,017,671</u>	<u>\$ 136,614</u>	<u>\$ -</u>	<u>\$ 4,154,285</u>
<b>Expenditures</b>				
Watershed Management	\$ 1,980,912	\$ 166,355	\$ -	\$ 2,147,267
<b>Total Expenditures</b>	<u>1,980,912</u>	<u>166,355</u>	<u>-</u>	<u>2,147,267</u>
<b>Other Funding Uses</b>				
Contribution to Fund Balance	-	-	-	-
Transfers Out to Capital Improvements Program Fund	1,281,034	(29,741)	-	1,251,293
Transfers Out to General Fund	459,675	-	-	459,675
Transfer to Debt Service	296,050	-	-	296,050
<b>Total Other Funding Uses</b>	<u>2,036,759</u>	<u>(29,741)</u>	<u>-</u>	<u>2,007,018</u>
<b>Total Expenditures and Other Funding Uses</b>	<u>\$ 4,017,671</u>	<u>\$ 136,614</u>	<u>\$ -</u>	<u>\$ 4,154,285</u>



**Town of Bluffton**  
**Capital Improvements Project Fund**

Section X. Item #4.

	Adopted FY 2025 Budget	Budget Amendment #1	Budget Amendment #2	Proposed FY 2025 Budget
<b>Revenues</b>				
Licenses & Permits	\$ 317,000	\$ -	\$ -	\$ 317,000
Grants and Entitlements	1,506,543	757,370	-	2,263,913
Intergovernmental	500,000	-	-	500,000
Service Revenues	-	-	-	-
Fines & Fees	-	-	-	-
Interest Income	-	-	-	-
Miscellaneous Revenues	-	-	-	-
<b>Total Revenues</b>	<b>2,323,543</b>	<b>757,370</b>	<b>-</b>	<b>3,080,913</b>
<b>Other Financing Sources</b>				
Transfers In	-	-	-	-
Hospitality Tax	4,943,305	488,690	-	5,431,995
Local Accommodations Tax	1,629,547	634,361	-	2,263,908
State Accommodations Tax	152,941	-	-	152,941
Stormwater Utility Tax	1,281,034	(29,741)	-	1,251,293
TIF	8,206,402	547,375	-	8,753,777
General Fund	941,000	2,357,390	500,000	3,798,390
General Fund-ARPA	241,207	-	-	241,207
CIP Fund Balance	13,549,135	3,065,965	-	16,615,100
<b>Total Other Financing Sources &amp; Transfers In</b>	<b>30,944,571</b>	<b>7,064,040</b>	<b>500,000</b>	<b>38,508,611</b>
<b>Total Revenues and Other Financing Sources</b>	<b>\$ 33,268,114</b>	<b>\$ 7,821,410</b>	<b>\$ 500,000</b>	<b>\$ 41,589,524</b>
<b>Expenditures</b>				
Economic Development Projects	\$ 3,204,420	\$ 832,666	\$ -	\$ 4,037,086
Facilities Projects	2,531,432	424,671	-	2,956,103
Housing Projects	1,478,480	120,735	-	1,599,215
Information Technology Infrastructure Projects	436,000	57,774	-	493,774
Land Acquisition	2,959,387	1,997,715	500,000	5,457,102
Park Projects	11,551,150	3,069,541	-	14,620,691
Road Projects	3,370,513	531,634	-	3,902,147
Stormwater and Sewer Projects	7,419,732	786,674	-	8,206,406
<b>Total Expenditures</b>	<b>32,951,114</b>	<b>7,821,410</b>	<b>500,000</b>	<b>41,272,524</b>
<b>Other Funding Uses</b>				
Transfer to General Fund	-	-	-	-
Contribution to Fund Balance	317,000	-	-	317,000
<b>Total Transfers</b>	<b>317,000</b>	<b>-</b>	<b>-</b>	<b>317,000</b>
<b>Total Expenditures and Other Funding Uses</b>	<b>\$ 33,268,114</b>	<b>\$ 7,821,410</b>	<b>\$ 500,000</b>	<b>\$ 41,589,524</b>



**Town of Bluffton  
Debt Service Fund Budget**

Section X. Item #4.

	Adopted FY 2025 Budget	Budget Amendment #1	Budget Amendment #2	Proposed FY 2025 Budget
<b>Revenues</b>				
<b>Property Taxes</b>				
Real & Personal Property Tax (TIF)	\$ 4,702,200	\$ -	\$ -	\$ 4,702,200
GO Bond Debt Service Property Tax	439,620	-	-	439,620
Total Property Tax	5,141,820	-	-	5,141,820
<b>Licenses &amp; Permits</b>				
Municipal Improvement District Fee	368,887	-	-	368,887
<b>Interest Income</b>	25,000	-	-	25,000
<b>Total Revenues</b>	5,535,707	-	-	5,535,707
<b>Other Financing Sources</b>				
Stormwater Utility Fund	296,050	-	-	296,050
Prior Year Fund Balance	4,620,409	547,375	-	5,167,784
<b>Total Other Financing Sources</b>	4,916,459	547,375	-	5,463,834
<b>Total Revenues and Other Financing Sources</b>	<u>\$ 10,452,166</u>	<u>\$ 547,375</u>	<u>\$ -</u>	<u>\$ 10,999,541</u>
<b>Expenditures</b>				
<b>Series 2014 TIF Bonds Debt Service</b>				
Principal	\$ 896,386	\$ -	\$ -	\$ 896,386
Interest	35,295	-	-	35,295
<b>Series 2022 TIF Bonds Debt Service</b>				
Principal	327,553	-	-	327,553
Interest	313,380	-	-	313,380
<b>Series 2020 GO Bonds Debt Service</b>				
Principal	255,000	-	-	255,000
Interest	122,050	-	-	122,050
<b>Series 2020A GO Bonds Debt Service (Projects)</b>				
Principal	165,000	-	-	165,000
Interest	131,050	-	-	131,050
<b>Miscellaneous</b>	50	-	-	50
<b>Total Expenditures</b>	2,245,764	-	-	2,245,764
<b>Other Funding Uses</b>				
Transfers Out to Capital Improvements Program Fund	8,206,402	547,375	-	8,206,402
<b>Total Other Funding Uses</b>	8,206,402	547,375	-	8,206,402
<b>Total Expenditures and Other Funding Uses</b>	<u>\$ 10,452,166</u>	<u>\$ 547,375</u>	<u>\$ -</u>	<u>\$ 10,452,166</u>

### Council Motion Recommendation

Consideration of an Ordinance Amending the Town of Bluffton Fiscal Year 2025 Budget to Provide for the Expenditures of Certain Funds; and to Allocate Sources of Revenue for the Said Funds – First Reading

**“I make a motion to approve the First Reading of an Ordinance Amending the Town of Bluffton Fiscal Year 2025 Budget to Provide for the Expenditures of Certain Funds; and to Allocate Sources of Revenue for the Said Funds.”**



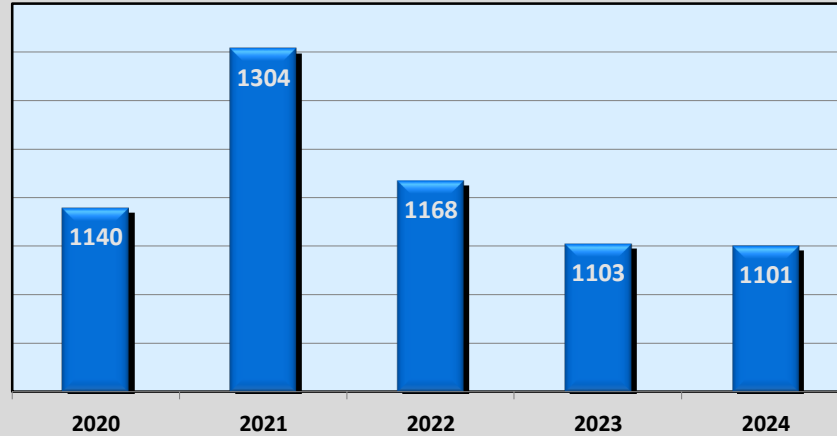
STATISTICAL INFORMATION

# BLUFFTON POLICE DEPARTMENT

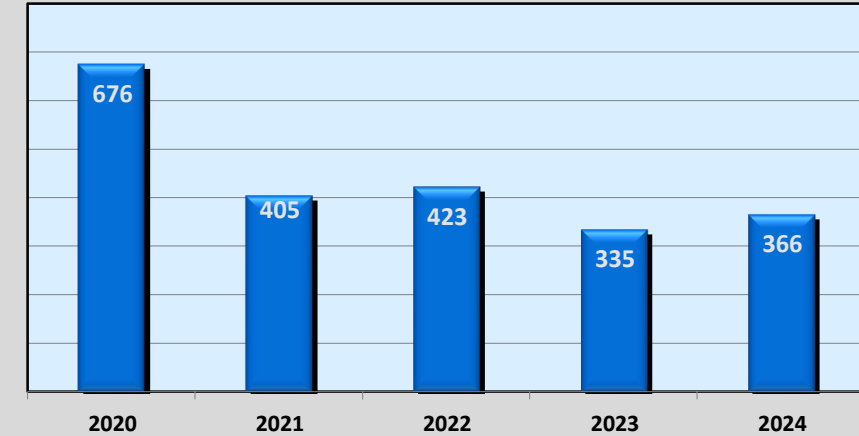
December 31, 2024

Presented by Chief Joseph Babkiewicz

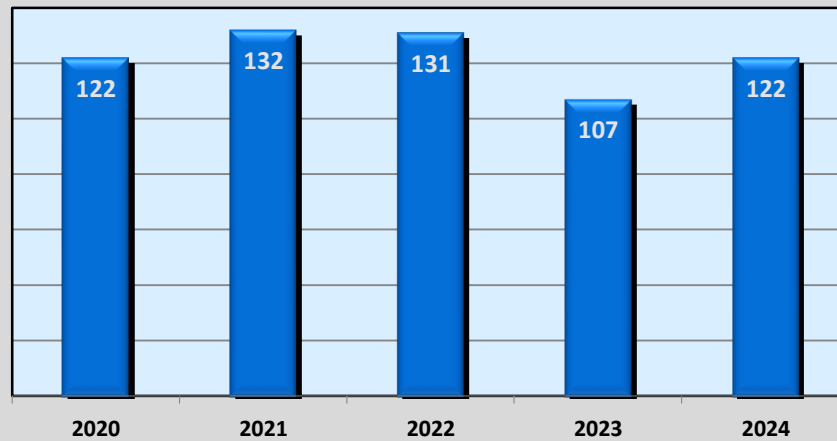
## December Calls for Service Comparison



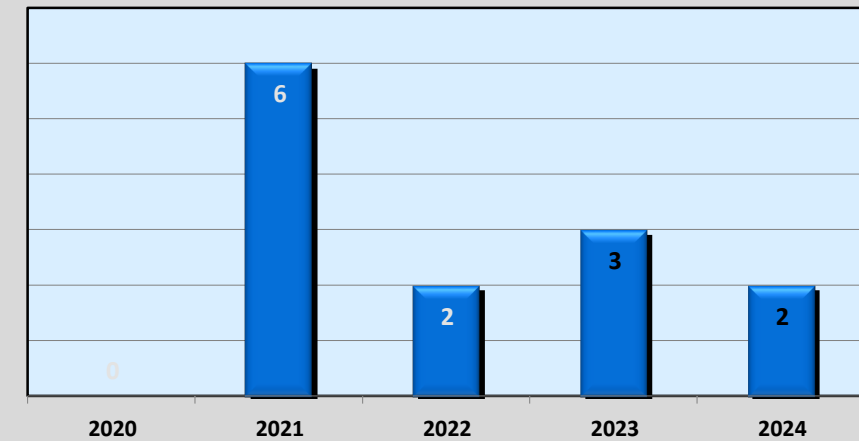
## December Traffic Citation Comparison



## December Collision Comparison



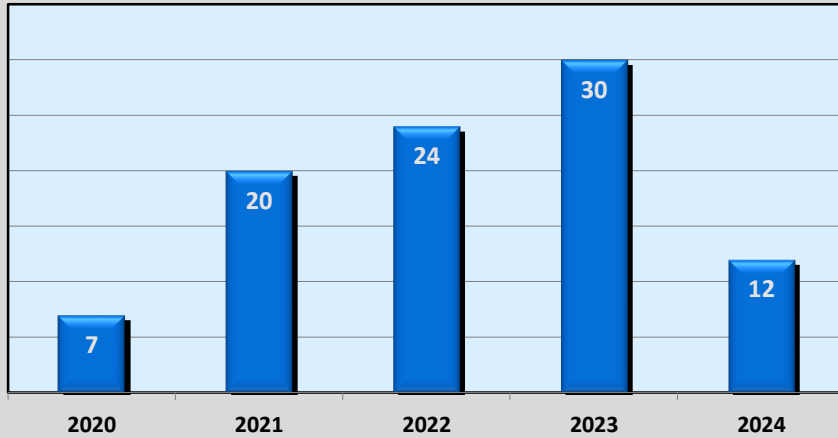
## December Burglary Comparison



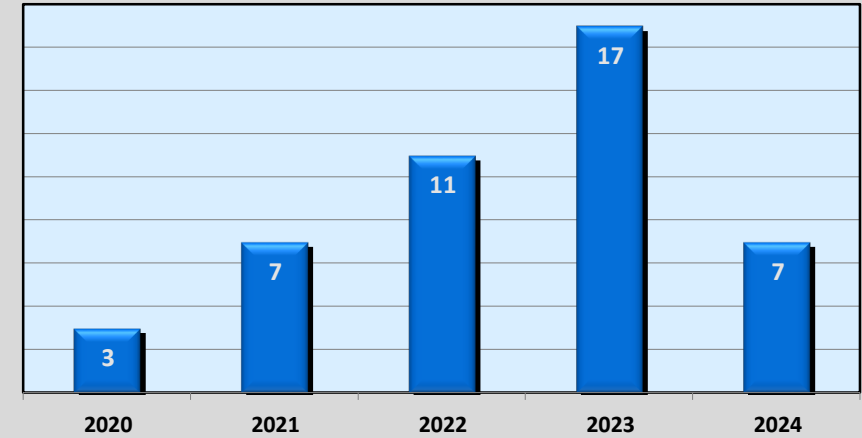
# DEPARTMENT HIGHLIGHTS

Section XI. Item #1.

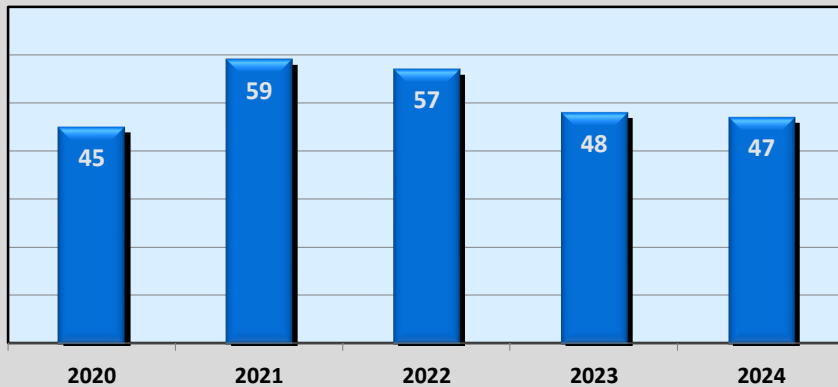
## December Theft Comparison



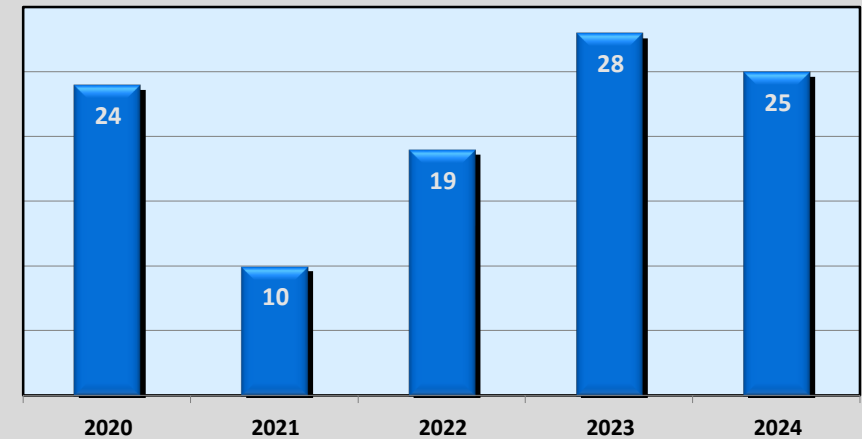
## December Assault Comparison



## December Domestic Calls for Service Comparison



## December Arrest Comparison



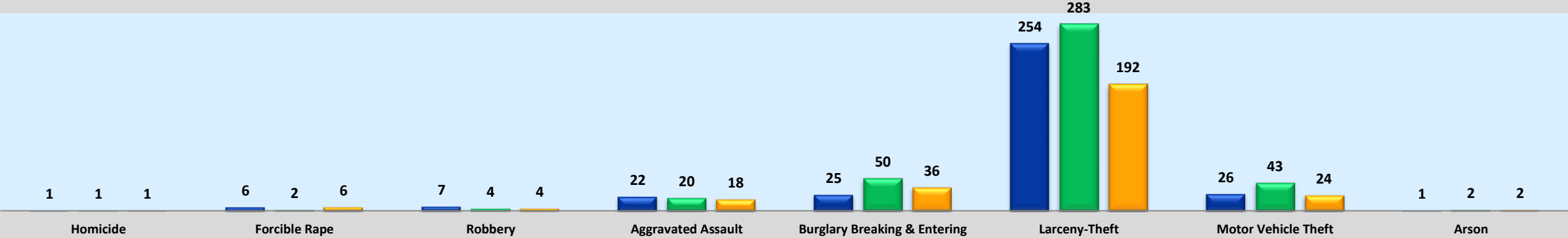


DEPARTMENT HIGHLIGHTS

Year-to-Date  
December

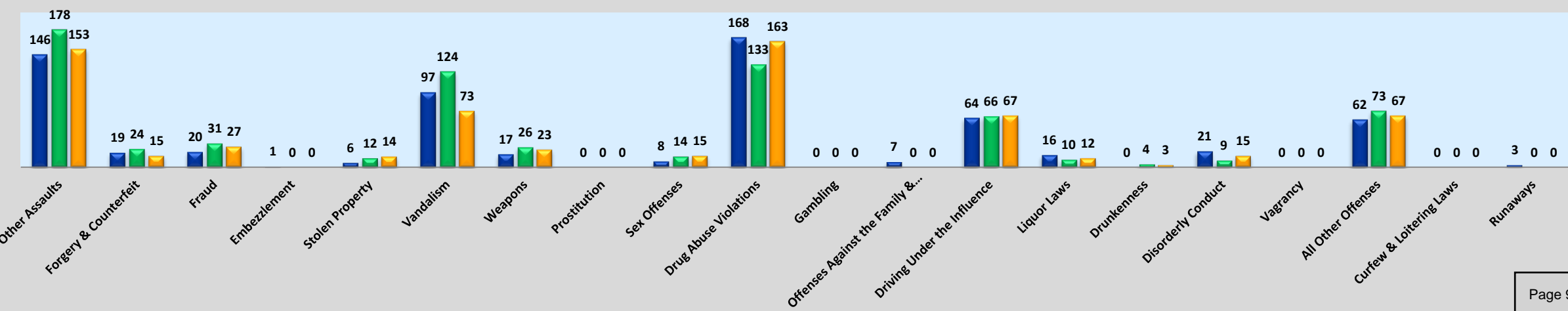
Part I Crimes

2024 2023 2022



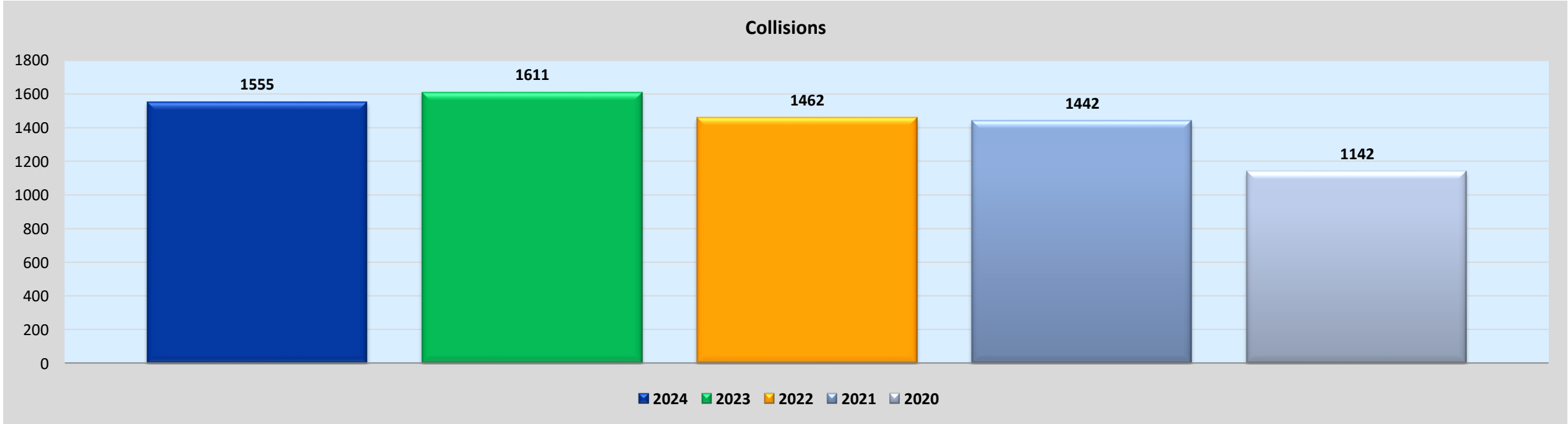
Part II Crimes

2024 2023 2022



Year-to-Date  
December

Collisions



## **Law Enforcement Advisory Committee**

- Meeting cancelled due to lack of quorum

## **Meetings Attended by Chief Joseph Babkiewicz**

**Every Wednesday** – Senior Staff Communications Meeting

**Every Wednesday** – Commanders Meeting

**Every Friday** – Men's Meeting @ Bible Missionary Baptist Church

**Dec 2<sup>nd</sup>** – Attend CIP Meeting

**Dec 2<sup>nd</sup>** – Attend meeting with Port Royal Police Chief

**Dec 2<sup>nd</sup>** – Attend Citizen Police Academy Graduation

**Dec 3<sup>rd</sup>** – Attend Disposition meeting

**Dec 3<sup>rd</sup>** – Meeting with Town Attorneys

**Dec 3<sup>rd</sup>** – Attend End of Phase 1 meeting – Recruit Hopper

**Dec 4<sup>th</sup>** – Police Sergeant Interview

**Dec 5<sup>th</sup>** – Meeting with Town Manager

**Dec 5<sup>th</sup>** – Attend Boys & Girls Club workshop

**Dec 6<sup>th</sup>** – Meeting with Sign D Sign

**Dec 6<sup>th</sup>** – Attend Annual Town Tree Lighting

**Dec 7<sup>th</sup>** – Attend Annual Town of Bluffton Christmas Parade

**Dec 10<sup>th</sup>** – Attend BCSC Reunification Walk Thru

**Dec 10<sup>th</sup>** – Attend Town Council Meeting

**Dec 11<sup>th</sup>** – Meeting with Town Manager

**Dec 11<sup>th</sup>** – Attend meeting at Montage Palmetto Bluff

**Dec 12<sup>th</sup>** – Attend December Birthday and Anniversary Celebration

**Dec 12<sup>th</sup>** – Deliver Toy Donations to Bluffton Self Help

**Dec 14<sup>th</sup>** – Shop with the Cop @ Walmart

## **Meetings Attended by Chief Joseph Babkiewicz cont.**

- Dec 15<sup>th</sup>** – Attend Wellness Committee meeting
- Dec 15<sup>th</sup>** – Attend CIP Meeting
- Dec 15<sup>th</sup>** – Attend Christmas Parade After Action Meeting
- Dec 15<sup>th</sup>** – Sergeants Meeting
- Dec 16<sup>th</sup>** – Attend Fleet Pre-Planning Zoom meeting
- Dec 16<sup>th</sup>** – Microsoft Teams meeting with Lexipol
- Dec 18<sup>th</sup>** – Attend FY26 Budget Departmental Kick-Off
- Dec 18<sup>th</sup>** – Attend Hanukkah Celebration
- Dec 18<sup>th</sup>** – Police Annual Christmas Party
- Dec 19<sup>th</sup>** – Meeting with Community Mental Health Coordinator
- Dec 19<sup>th</sup>** – Meeting @ Low Country Community Church – Christmas Experience
- Dec 19<sup>th</sup>** – Attend Boys & Girls Club Christmas Party
- Dec 20<sup>th</sup>** – Microsoft Teams Meeting with Lexipol
- Dec 21<sup>st</sup>** – Attend Shop with Cop Make-up

Commendations -	None
Complaints -	None

Police Department Demographics as of December 31, 2024

DEPARTMENT	Black	Hispanic	Other	White	Grand Total
Female	2	4	1	17	24
Male	7	5	3	35	50
Grand Total	9	9	4	52	74

SWORN OFFICERS	Black	Hispanic	Other	White	Grand Total
Female	1	1		9	11
Male	6	5	3	31	45
Grand Total	7	6	3	40	56

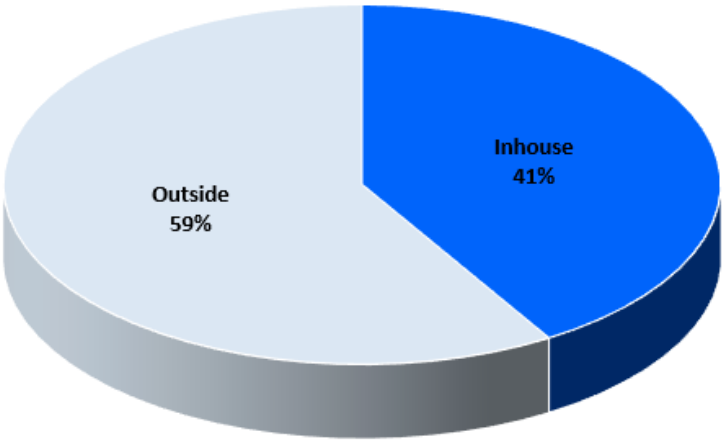
# December Officer Training

**In-House**

- Line-Up 2024 - November-December - 2 officers
- Anti-Bias Training for LE - 1 officer
- Pre-Academy Training - 2 Recruits
- Generational Differences for Law Enforcement - 1 officer
- Line-Up 2025 January-February - 38 officers
- DMT Recertification - 1 officer
- Active Shooter Preparedness - 1 officer
- Eye Dominance - 1 officer
- Recruiting Excellent Employees - 1 officer

**Outside**

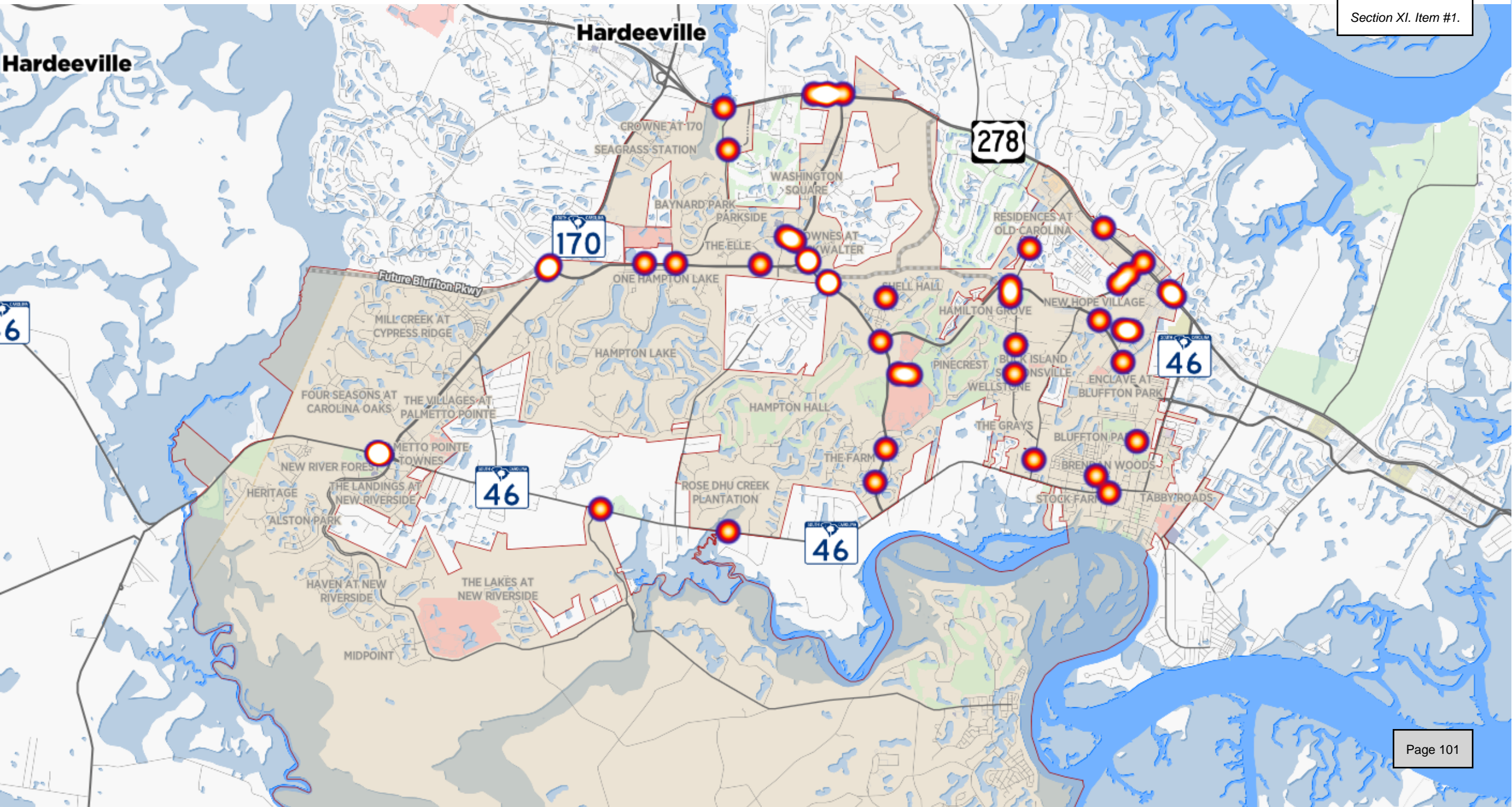
- NRA Patrol Rifle Instructor Course - 1 officer
- FBI LEEDA SLI - 1 officer
- Tac Med for First Responders - 1 officer
- FBINAA Training - 1 officer



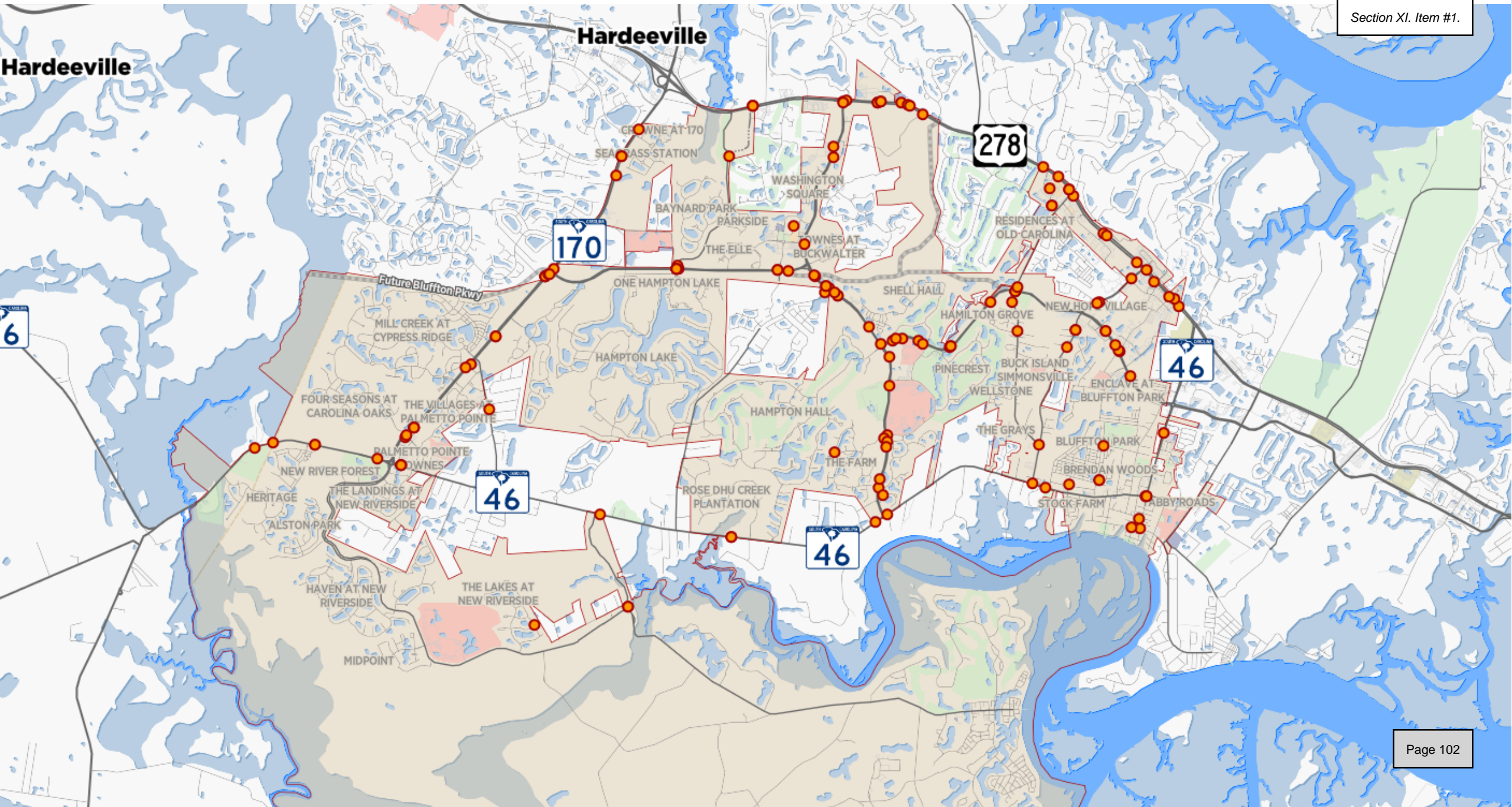


# COLLISIONS (122) December 2024

Section XI. Item #1.



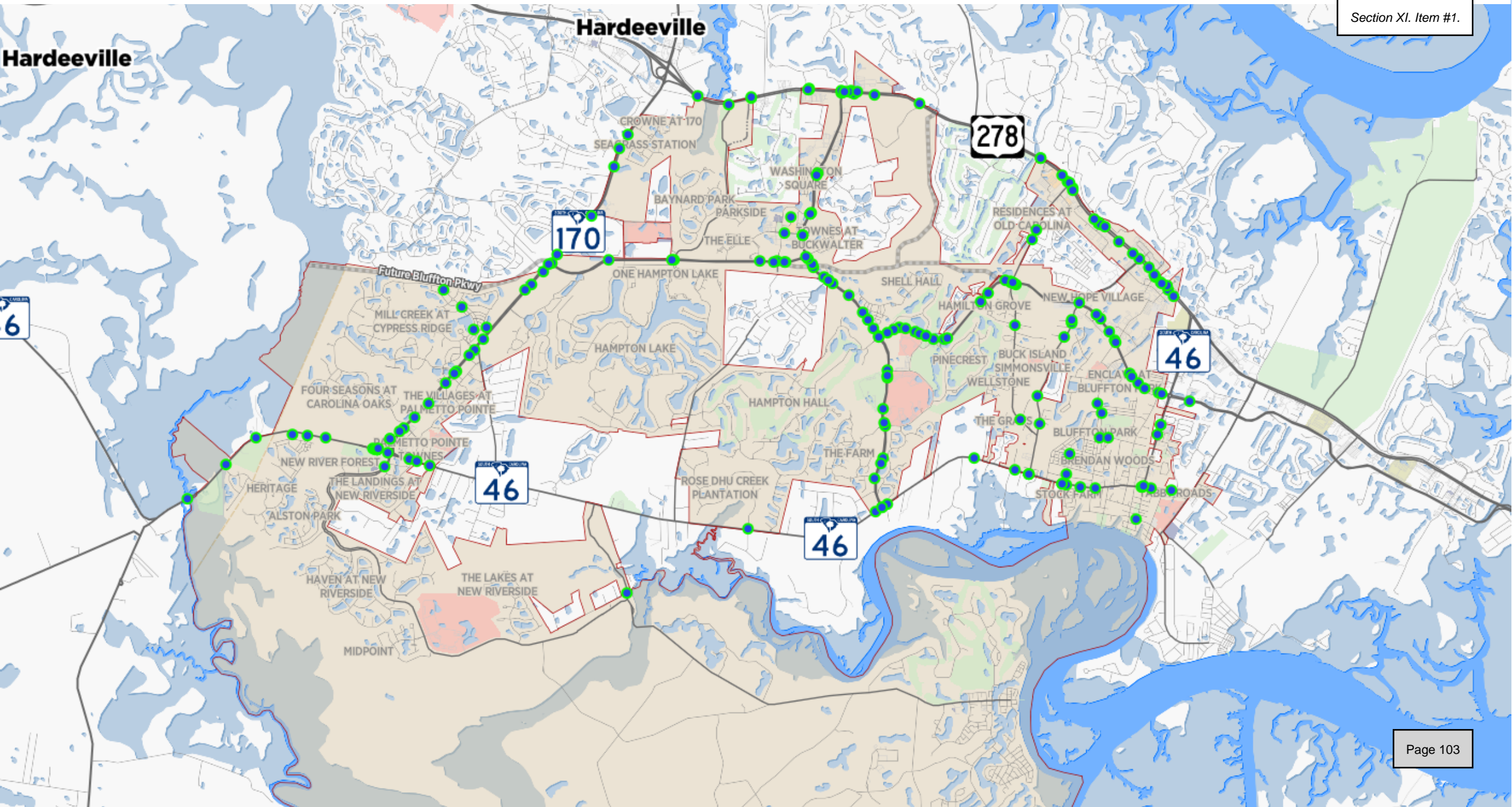






# WARNINGS ISSUED (224) December 2024

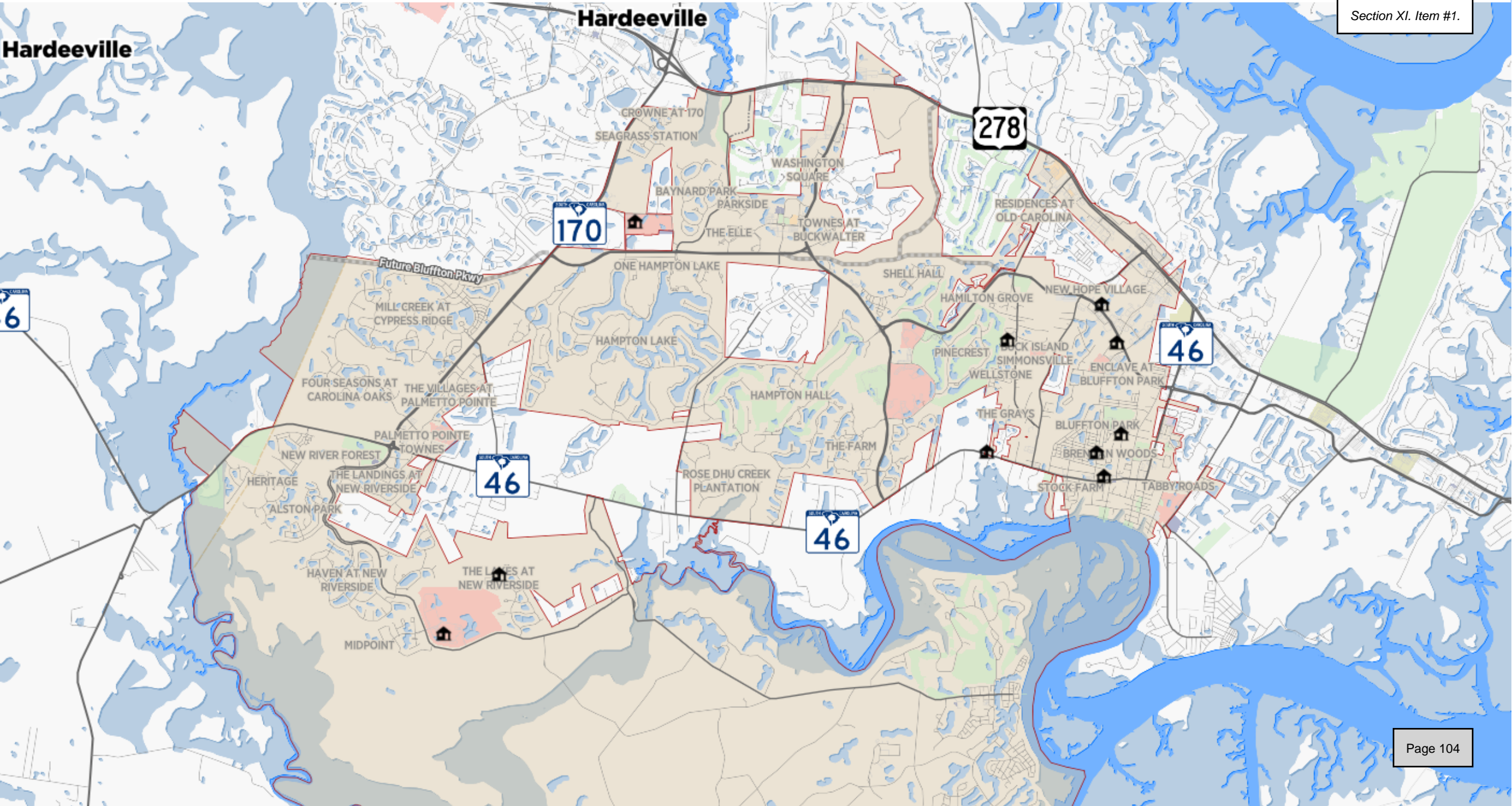
Section XI. Item #1.





# THEFTS (12) December 2024

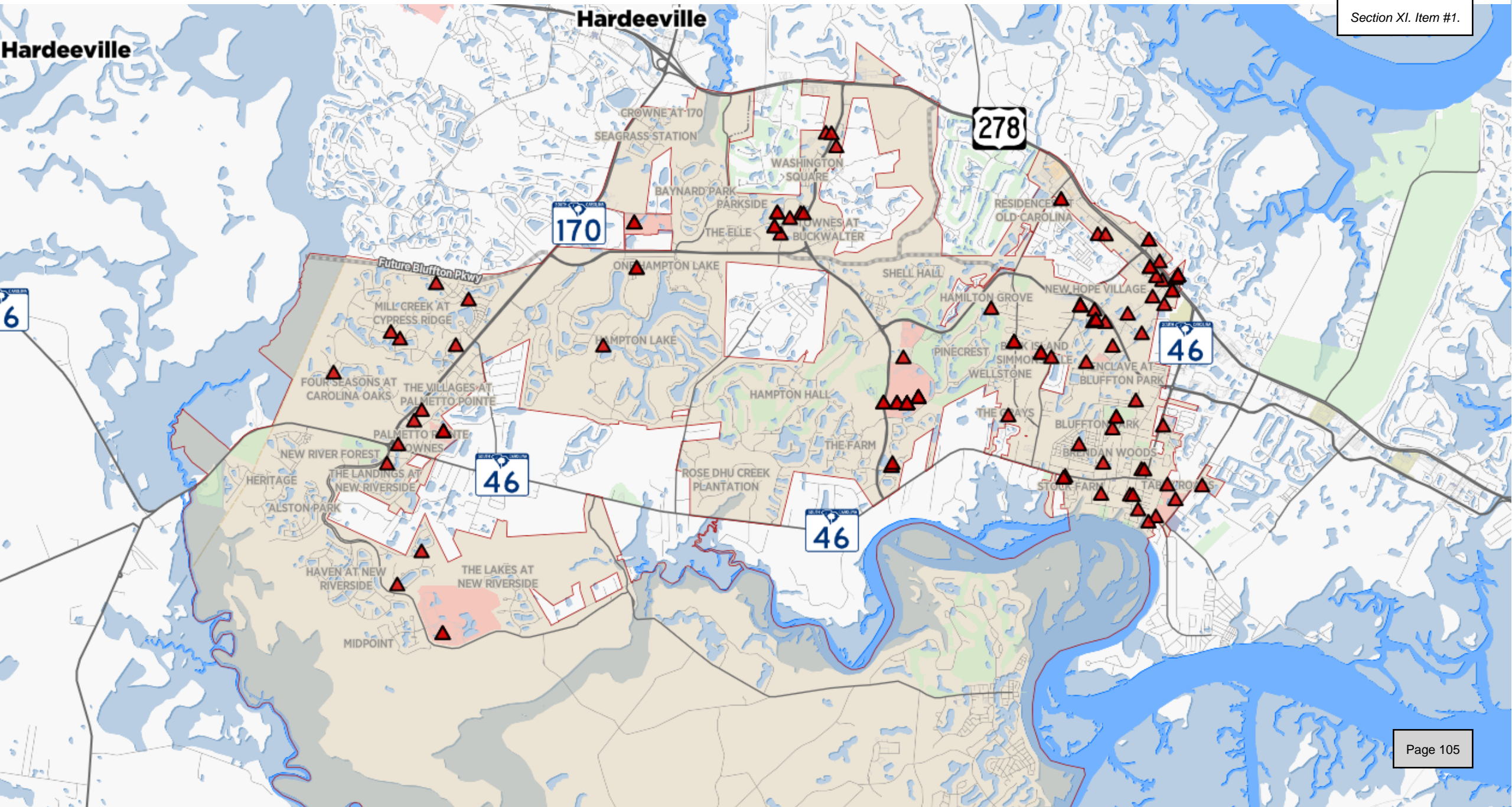
Section XI. Item #1.





# #1 CALL TYPE – Activated Alarms (132) December 2024

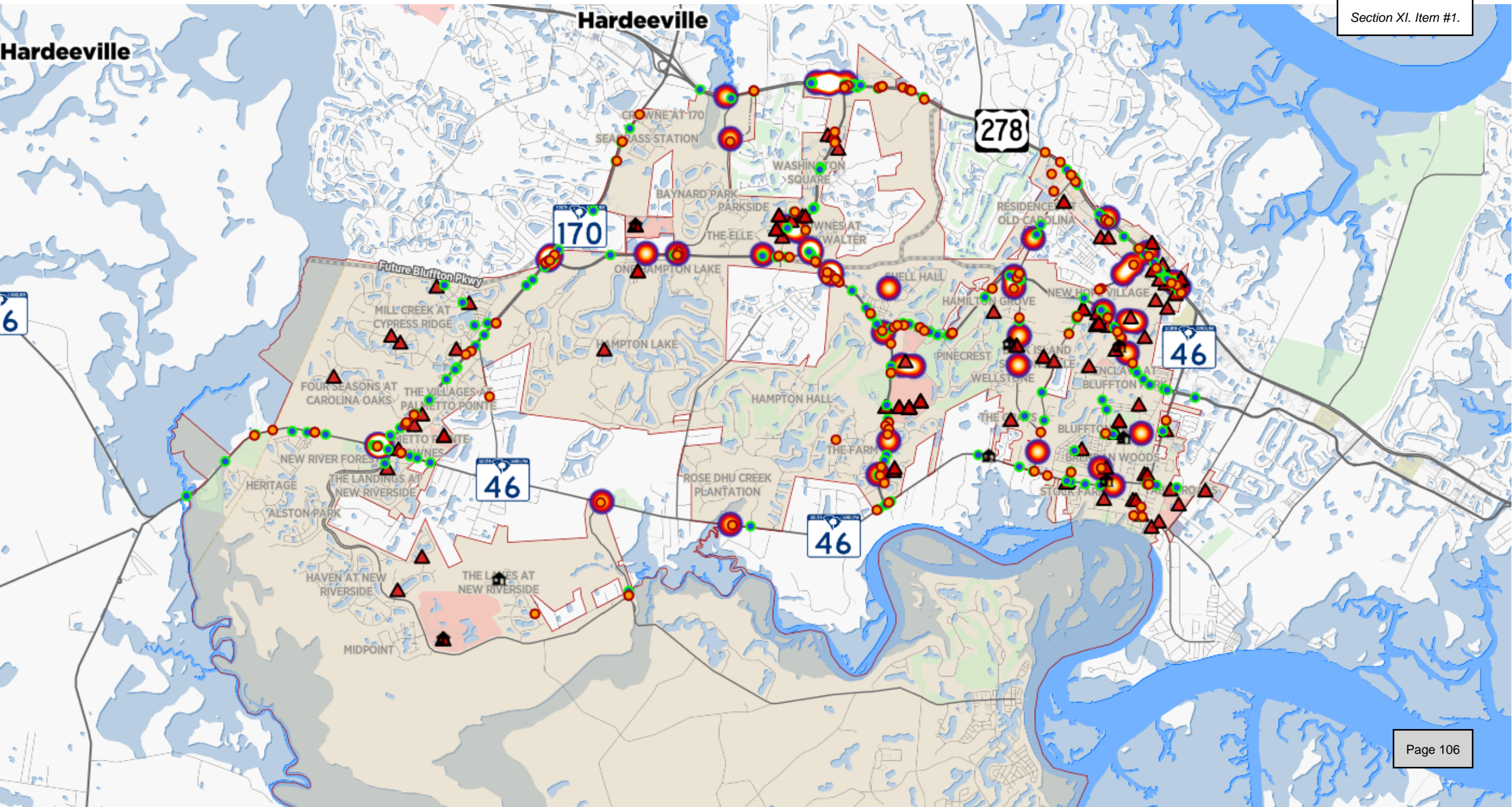
Section XI. Item #1.





# COLLISIONS, CITATIONS, WARNINGS, THEFTS AND Activated Alarms – December 2024

Section XI. Item #1.



CALLS FOR SERVICE TOP 10 CALL TYPES	
Activated Alarm	132
Case Follow Up	109
Disturbance	77
911 Hang-Up	73
Accident	59
Reckless Driving	46
Domestic	39
Suspicious Vehicle	28
Parking Violations	28
Assist Motorist	28

**TOTAL CALLS FOR SERVICE: 1101**

**AVERAGE PER DAY: 38**

PRO-ACTIVE PATROLS	
Extra Patrol - Business	572
Extra Patrol - Residence	389
Traffic Stop	305
Traffic Enforcement	19



UNIFORM TRAFFIC CITATIONS TOP 10 VIOLATIONS	
Operating Vehicle while License/Registration Expired	22
Driving Without A License	22
Driving Under Suspension	17
Failure to Return License Plate and Registration Upon Loss of Insurance	16
Speeding 15MPH-24MPH Over Speed Limit	8
Possession of 28g (1oz) or Less of Marijuana	7
Driving Under the Influence	7
Failure to Maintain Proof of Insurance	4
Speeding 11MPH-15MPH Over Speed Limit	3
Improper Vehicle License	3
Open Container of Beer or Wine in Motor Vehicle	3

TOTAT CITATIONS ISSUED: 142

AVERAGE PER DAY: 5

UNIFORM TRAFFIC WARNINGS TOP 10 VIOLATIONS	
Defective Equipment	44
Speeding	36
Vehicle License Violation	23
Other	15
Improper Lights	12
Improper Lane Use	11
Speeding & more	10
Vehicle License Violation & more	10
Disregarding Stop Sign	8
Changing Lane Unlawfully & more	14

TOTAL WARNINGS ISSUED: 224

AVERAGE PER DAY: 8

CRIMINAL INVESTIGATIONS	
Cases Assigned	40
Incident Reports	4
Supplemental Reports	41
Cases Closed	22
Arrests Made	7
Arrest Warrants	2
Bond Court/Grand Jury	6
Case Call Outs	2
Search Warrants	10

**Case Call Outs:**

1. 24BP32144 – Assault & Battery
2. 24BP32303 - Suicide

**Bond Court:**

1. None

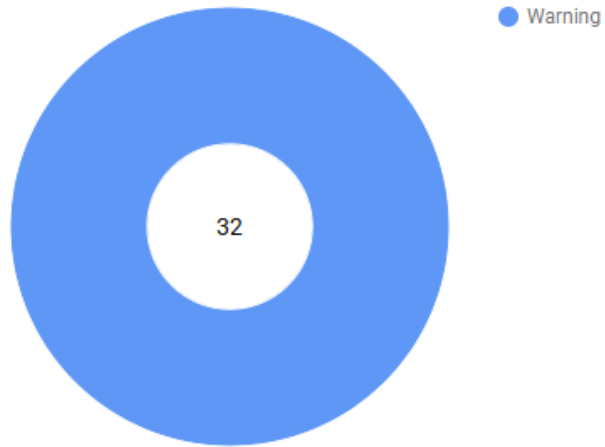
**Mental Health Advocate:**

- 0 – CIT
- 9 – Referrals
- 18 – Follow Ups
- 0 – Intel Analysis

# COMMUNITY SERVICE ASSISTANTS

Section XI. Item #1.

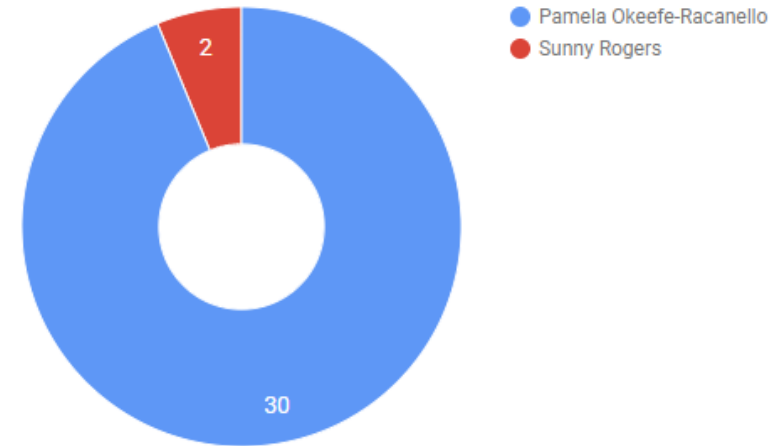
Tickets By Status Last 30 Days



Total Count: 32

As of 12/27/2024, 12:00:00 AM

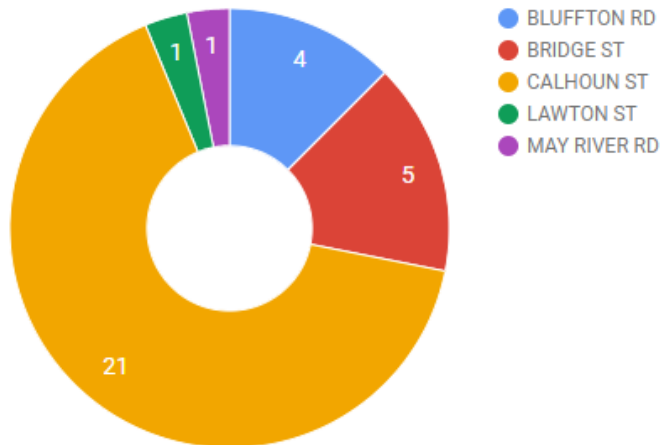
Tickets By Officer Last 30 Days



Total Count: 32

As of 12/27/2024, 12:00:00 AM

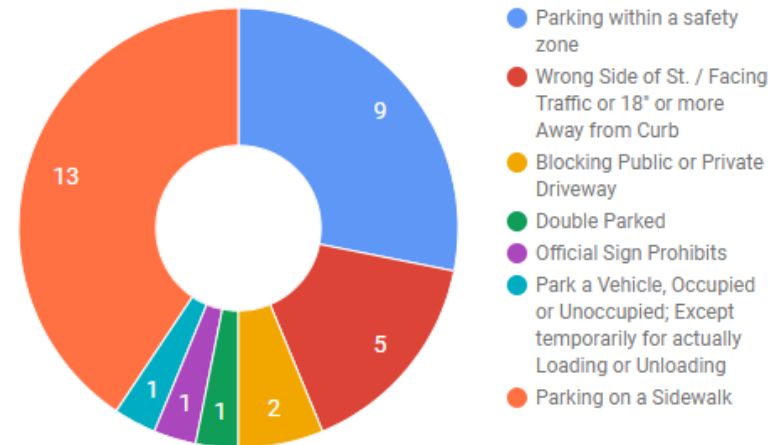
Tickets By Location Last 30 Days



Total Count: 32

As of 12/27/2024, 12:00:00 AM

Tickets By Violation Last 30 Days

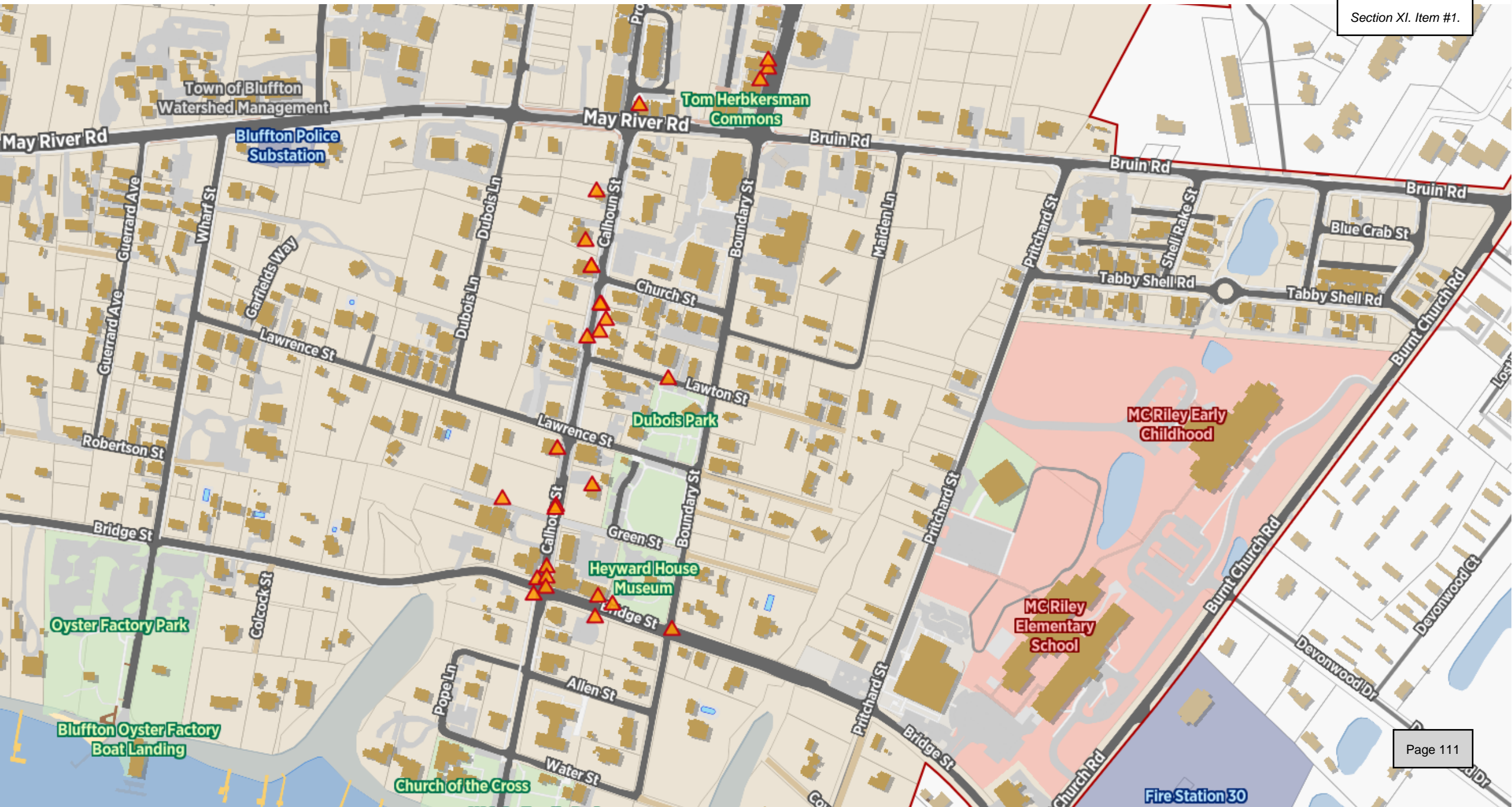


Total Count: 32

As of 12/27/2024, 12:00:00 AM

# DOWNTOWN CITATIONS (32) – December 2024

Section XI. Item #1.



## **Code Enforcement:**

William Bonhag

### **Signs**

- Multiple Business advertisement signs removed from Old Town and various locations throughout Bluffton.
- \* Working on HTAX & ATAX letters along with follow-up collections.

### **Complaints / Property Checks / Follow-ups / Ordinance Letters**

- 1238 ,1240,1242 May River Road, working with this group as they are cleaning up these locations that have been longtime neglected. Status ongoing progress.

#### **1238 May River Road**

- August 20,2024 Court for 1238 May River Road for illegal dumping and running business from location with building materials need to be removed. Failed to appear. 8/20/24; 2 NOV's issued for compliance date of Monday 8/26/24, failure to comply resulted in Summons issued for court 9/17/24 for Miguel Sanchez-Bocenegra at 9am. Failure to show, property owner contacted, pending property clean up.
- Spoke with the renter and agreed to clean all, ongoing at this time, daily checks for compliance.

#### **102 Buckwalter Parkway Units 3UV & Q3**

- Cassie Clayshulte Photo Studio from unit Q3, complainant indicating no action by manager or owner for leaking roof, has been an ongoing issue. (corner Unit)
- Dr. Jessica Joyce of Psychological & Counseling Associates of the Low Country in Unit 3UV has 3 pails in her corner office and 4 ceiling tiles down due to continuous leaking. (corner Unit opposite end from Cassie's Studio).
- Friday 11/22/24 at 9am, Marcus Noe Chief Building Inspector and I shall be meeting at this location to conduct an inspection of the roof and offices involved.
- Building owned by Kumar Bhavanasi of Piscataway NJ, President, CEO & Founder of FirstTek
- Property Manager is AIM Realestate.

#### **218 Buck Island Rd / owner Norberto Angeles**

- The property is sold 6/6/24 to Norberto Angeles.
- All motor vehicles are off property.
- All Motor Homes have been removed or demolished for transport via dumpsters.
- Major progress has been made with this property and will follow up soon w/ before and after photos as requested by Town Manager Stephen Steese.

## Code Enforcement continued:

### 131 Goethe Road

- Claudia Gomez Aguilar was issued letters pertaining to her blatant display of party chairs and tables, along with a possible construction business operating from this location. Tried to open communication with a male subject in the driveway in a work truck, advised him everything needs to be removed and cleaned up.
- Will be re-visiting to deliver NOV as operating w/o a BL from this location, which is zoned Residential Only area.

### 218 Simmonsville Road

- 3/14/24 Due to several violations, this location was boarded up.
- This matter is pending actions by Building Safety upon receipt of property ownership email or contact by Mrs. Mitchell to Robert Cullen. Unfortunately, Mrs. Mitchell has passed, and this matter is on hold with the Building Department.
- Vicky Smalls visited location with our team on 11/14/24. Vicky is trying to contact the oldest sibling regarding heirs' property transfer. Vicky will assist with dumpsters and town public works will use machinery to clean the property upon the completion of this demolition.

COMMUNITY ACTION TEAM
Bluffton Self Help Toy Donation Delivery
Outside Sergeant Command Interview
School Resource Officer Rifle Qualifications
Shop with A Cop
Christmas Parade



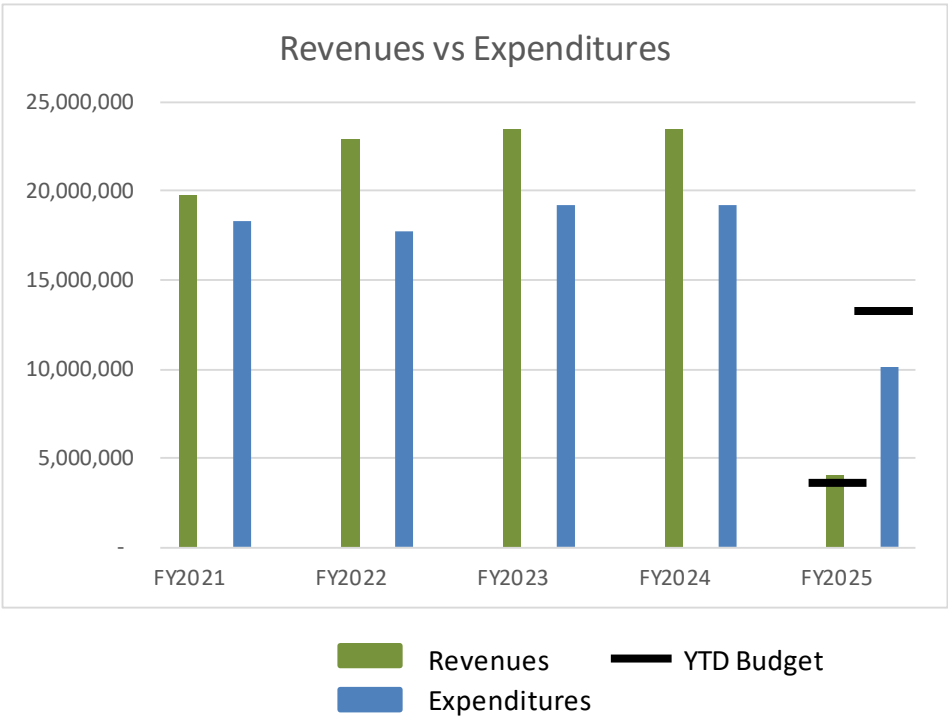
TOWN COUNCIL  
STAFF REPORT  
Finance & Administration Department



MEETING DATE:	January 14, 2025
PROJECT:	Consent Agenda: Year-to-date Financial Report
PROJECT MANAGER:	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 FY2025 year-to-date (YTD) through November 2024. Revenues have been higher than expenditures for the last four full years.



FY2025 YTD through November shows General Fund total revenues above the total budgeted amount with building permits having the largest impact. YTD November expenditures in total are tracking below the budgeted amounts with the exception of Municipal Court due to timing of an annual contract payment occurring earlier than in prior years.

**FY25 General Fund Financial Overview**

Revenues		Expenditures
\$4,074k	<i>YTD</i>	\$10,069k
115.8%	<i>% of Budget</i>	72.6%
\$3,519k	<i>YTD Budget</i>	\$13,872k

**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 November 30, 2024**

Section XI. Item #1.

	Month of November 2024					Year-to-Date thru November 30, 2024				
	FY 2024	FY 2025	More/(Less)	Budget	Over / (Under)	FY 2024	FY 2025	More/(Less)	Budget	Over / (Under)
<b>Revenues</b>										
Property Taxes	\$ 171,113	\$ 214,252	\$ 43,139	\$ 187,542	\$ 26,710	\$ 492,577	\$ 411,103	\$ (81,474)	\$ 539,528	\$ (128,425)
Licenses & Permits										
Business Licenses	83,975	68,704	(15,271)	82,899	(14,195)	496,285	503,706	7,421	455,891	47,815
MASC Telecommunications	-	-	-	-	-	-	302	302	-	302
MASC Insurance Tax Collection	-	-	-	-	-	-	1,563	1,563	-	1,563
Franchise Fees	-	264,075	264,075	-	264,075	501,353	577,667	76,314	589,268	(11,601)
Building Safety Permits	132,278	207,209	74,931	84,089	123,120	953,741	1,136,755	183,014	599,297	537,458
Application Fees	7,900	5,825	(2,075)	6,906	(1,081)	34,700	37,965	3,265	30,335	7,630
Total Licenses & Permits	224,153	545,813	321,660	173,894	371,919	1,986,079	2,257,958	271,879	1,674,791	583,167
Grants and Entitlements	50,000	50,000	-	-	50,000	409,328	458,064	48,736	490,002	(31,938)
Intergovernmental	-	-	-	-	-	-	-	-	-	-
Service Revenues	17,745	48,463	30,718	26,879	21,584	197,161	350,301	153,140	199,319	150,982
Fines & Fees	9,804	6,936	(2,867)	9,506	(2,570)	56,757	45,551	(11,206)	54,950	(9,399)
Interest Income	24,390	18,898	(5,492)	32,013	(13,115)	156,701	133,614	(23,087)	205,677	(72,063)
Miscellaneous Revenues	13,404	11,741	(1,663)	21,694	(9,953)	45,988	327,900	281,912	61,738	266,162
Total Revenues	510,609	896,103	385,495	451,528	444,575	3,344,592	3,984,491	639,899	3,226,005	758,486
Other Financing Sources	-	5,650	5,650	-	5,650	-	5,650	5,650	-	5,650
Transfers In	73,168	84,267	11,099	292,626	(208,359)	78,241	84,267	6,026	292,626	(208,359)
Total Other Financing Sources & Transfers In	73,168	89,917	16,749	292,626	(202,709)	78,241	89,917	11,676	292,626	(202,709)
Total Revenues and Other Financing Sources	\$ 583,777	\$ 986,020	\$ 402,244	\$ 744,154	\$ 241,866	\$ 3,422,833	\$ 4,074,408	\$ 651,575	\$ 3,518,631	\$ 555,777
<b>Expenditures</b>										
Town Council	\$ 9,749	\$ 11,828	\$ 2,079	\$ 13,804	\$ (1,976)	\$ 47,320	\$ 55,046	\$ 7,726	\$ 67,004	\$ (11,958)
Executive	108,587	119,205	10,618	150,533	(31,328)	515,272	609,368	94,096	714,315	(104,947)
Economic Development	41,272	16,918	(24,354)	52,009	(35,091)	199,193	217,207	18,014	251,014	(33,807)
Human Resources	39,166	69,347	30,181	54,572	14,775	214,900	245,083	30,183	299,429	(54,346)
Communications and Community Outreach	32,663	48,940	16,277	67,847	(18,907)	236,502	253,015	16,513	491,257	(238,242)
Police	773,432	737,013	(36,419)	1,173,719	(436,706)	3,457,132	3,618,348	161,216	5,264,971	(1,646,623)
Municipal Judges	5,792	7,993	2,201	8,354	(361)	37,670	41,005	3,335	54,334	(13,329)
Municipal Court	27,664	117,359	89,695	33,578	83,781	136,968	233,905	96,937	166,248	67,657
Finance	77,771	85,214	7,443	110,263	(25,049)	355,025	440,575	85,550	503,352	(62,777)
Information Technology	91,727	116,099	24,372	124,105	(8,006)	925,841	1,018,098	92,257	1,252,644	(234,546)
Customer Service	21,433	19,416	(2,017)	28,100	(8,684)	96,421	94,656	(1,765)	126,412	(31,756)
Planning & Community Development	103,671	99,082	(4,589)	143,655	(44,573)	602,955	514,890	(88,065)	835,503	(320,613)
Building Safety	77,461	62,063	(15,398)	99,462	(37,399)	425,750	315,039	(110,711)	546,676	(231,637)
Project Management	61,914	59,121	(2,793)	59,318	(197)	310,057	290,122	(19,935)	297,057	(6,935)
Public Works	147,140	228,956	81,816	221,729	7,227	752,883	1,009,308	256,425	1,134,541	(125,233)
Town Wide	258,242	349,389	91,147	373,104	(23,715)	1,292,539	1,113,686	(178,853)	1,867,439	(753,753)
Total Expenditures	1,877,684	2,147,943	270,259	2,714,152	(566,209)	9,606,428	10,069,351	462,923	13,872,196	(3,802,845)
Other Financing Uses										
Contribution to Fund Balance	-	-	-	-	-	-	-	-	-	-
Transfers Out to Capital Improvements Program Fund	-	-	-	-	-	-	-	-	-	-
Total Transfers	-	-	-	-	-	-	-	-	-	-
Total Expenditures and Other Financing Uses	\$ 1,877,684	\$ 2,147,943	\$ 270,259	\$ 2,714,152	\$ (566,209)	\$ 9,606,428	\$ 10,069,351	\$ 462,923	\$ 13,872,196	\$ (3,802,845)



Town of Bluffton  
Actual Versus Budget  
For Period Ending November 30, 2024

Section XI. Item #1.

t 2

	Month of November 2024					Year-to-Date thru November 30, 2024				
	FY 2024	FY 2025	More/(Less)	Budget	Over / (Under)	FY 2024	FY 2025	More/(Less)	Budget	Over / (Under)
<b>Revenues</b>										
Stormwater Utility Fee	\$ 15,414	\$ 16,642	\$ 1,228	\$ 14,818	\$ 1,824	\$ 21,103	\$ 35,262	\$ 14,159	\$ 20,287	\$ 14,975
Licenses & Permits										
NPDES Plan Review Fee	2,750	15,500	12,750	2,324	13,176	43,725	44,475	750	36,948	7,527
NPDES Inspection Fee	16,800	24,650	7,850	14,507	10,143	128,350	125,550	(2,800)	110,829	14,721
Total Licenses & Permits	19,550	40,150	20,600	16,830	23,320	172,075	170,025	(2,050)	147,777	22,248
<b>Total Revenues</b>	<b>34,964</b>	<b>56,792</b>	<b>21,828</b>	<b>31,649</b>	<b>25,143</b>	<b>193,178</b>	<b>205,287</b>	<b>12,109</b>	<b>168,064</b>	<b>37,223</b>
<b>Total Revenues and Other Financing Sources</b>	<b>\$ 34,964</b>	<b>\$ 56,792</b>	<b>\$ 21,828</b>	<b>\$ 31,649</b>	<b>\$ 25,143</b>	<b>\$ 193,178</b>	<b>\$ 205,287</b>	<b>\$ 12,109</b>	<b>\$ 168,064</b>	<b>\$ 37,223</b>
<b>Expenditures</b>										
Watershed Management	\$ 84,749	\$ 141,219	\$ 56,470	\$ 136,039	\$ 5,180	\$ 425,933	\$ 493,100	\$ 67,167	\$ 683,707	\$ (190,607)
<b>Total Expenditures</b>	<b>84,749</b>	<b>141,219</b>	<b>56,470</b>	<b>136,039</b>	<b>5,180</b>	<b>425,933</b>	<b>493,100</b>	<b>67,167</b>	<b>683,707</b>	<b>(190,607)</b>
<b>Other Financing Uses</b>										
Transfers Out to Capital Improvements Program Fund	-	-	-	-	-	-	-	-	-	-
Transfers Out to General Fund	-	-	-	-	-	-	-	-	-	-
Transfer Out to Debt Service	69,400	65,525	(3,875)	69,931	(4,406)	69,400	65,525	(3,875)	69,931	(4,406)
Contribution to Fund Balance	-	-	-	-	-	-	-	-	-	-
<b>Total Transfers</b>	<b>69,400</b>	<b>65,525</b>	<b>(3,875)</b>	<b>69,931</b>	<b>(4,406)</b>	<b>69,400</b>	<b>65,525</b>	<b>(3,875)</b>	<b>69,931</b>	<b>(4,406)</b>
<b>Total Expenditures and Other Financing Uses</b>	<b>\$ 154,149</b>	<b>\$ 206,744</b>	<b>\$ 52,595</b>	<b>\$ 205,970</b>	<b>\$ 774</b>	<b>\$ 495,333</b>	<b>\$ 558,625</b>	<b>\$ 63,292</b>	<b>\$ 753,638</b>	<b>\$ (195,013)</b>



**Town of Bluffton**  
**Budget and Actual - Capital Improvement Program Fund**  
**For Period Ending November 30, 2024**

	YTD Actual	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	\$ 156,948	\$ 3,204,420	\$ 832,666	\$ 4,037,086	\$ 3,880,138	3.9%
<b>Total Economic Development</b>	<b>156,948</b>	<b>3,204,420</b>	<b>832,666</b>	<b>4,037,086</b>	<b>3,880,138</b>	<b>3.9%</b>
<b>Facilities</b>						
Town Hall Improvements	33,791	-	64,887	64,887	31,096	52.1%
Squire Pope Carriage House	238,867	615,000	240,613	855,613	616,746	27.9%
Law Enforcement Center Facility Improvements	3,104	405,000	74,056	479,056	475,952	0.6%
Sarah Riley Hooks Cottage	27,409	1,411,432	45,115	1,456,547	1,429,138	1.9%
Town Facilities ADA Compliance Plan - NEW	-	100,000	-	100,000	100,000	0.0%
<b>Total Facilities</b>	<b>303,171</b>	<b>2,531,432</b>	<b>424,671</b>	<b>2,956,103</b>	<b>2,652,932</b>	<b>10.3%</b>
<b>Housing</b>						
Affordable Housing Project	6,193	1,478,480	120,735	1,599,215	1,593,022	0.4%
<b>Total Housing</b>	<b>6,193</b>	<b>1,478,480</b>	<b>120,735</b>	<b>1,599,215</b>	<b>1,593,022</b>	<b>0.4%</b>
<b>Information Technology Infrastructure</b>						
Community Safety Cameras Phase 6	91,558	195,000	37,210	232,210	140,652	39.4%
Network Improvements	85,688	241,000	20,564	261,564	175,876	32.8%
<b>Total Parks</b>	<b>177,246</b>	<b>436,000</b>	<b>57,774</b>	<b>493,774</b>	<b>316,528</b>	<b>35.9%</b>
<b>Land</b>						
Land Acquisition	13,832	2,959,387	1,997,715	4,957,102	4,943,270	0.3%
<b>Total Land</b>	<b>13,832</b>	<b>2,959,387</b>	<b>1,997,715</b>	<b>4,957,102</b>	<b>4,943,270</b>	<b>0.3%</b>
<b>Parks</b>						
Park Improvements	171,751	236,228	190,331	426,559	254,808	40.3%
Oyster Factory Park	22,200	433,048	55,000	488,048	465,848	4.5%
Oscar Frazier Park	421,437	112,000	523,967	635,967	214,530	66.3%
New Riverside Park/Barn Site	4,256,680	7,335,254	2,148,834	9,484,088	5,227,408	44.9%
New River Trail	34,165	2,460,430	99,221	2,559,651	2,525,486	1.3%
New Riverside Village Park	979	-	52,457	52,457	51,478	1.9%
Buckwalter Place Park Improvements	24,733	774,190	-	774,190	749,457	3.2%
Public Art	19,875	200,000	(269)	199,731	179,856	10.0%
<b>Total Parks</b>	<b>4,951,820</b>	<b>11,551,150</b>	<b>3,069,541</b>	<b>14,620,691</b>	<b>9,668,871</b>	<b>33.9%</b>
<b>Roads</b>						
Pathway Pedestrian Safety Improvements	26,171	532,418	108,248	640,666	614,495	4.1%
Calhoun Street Streetscape	8,312	434,008	13,617	447,625	439,313	1.9%
BIS Neighborhood Sidewalks & Lighting	-	-	20,000	20,000	20,000	0.0%
Wharf Street Lighting	-	-	244,560	244,560	244,560	0.0%
Boundary Street Lighting	-	-	23,224	23,224	23,224	0.0%
Boundary Street Streetscape	13,580	1,887,675	79,996	1,967,671	1,954,091	0.7%
Townwide Wayfinding Signage System	-	65,000	30,000	95,000	95,000	0.0%
Historic District Overhead Power Conversion	-	74,000	-	74,000	74,000	0.0%
Ghost Roads	77	377,412	11,989	389,401	389,324	0.0%
<b>Total Roads</b>	<b>48,140</b>	<b>3,370,513</b>	<b>531,634</b>	<b>3,902,147</b>	<b>3,854,007</b>	<b>1.2%</b>
<b>Stormwater and Sewer</b>						
Sewer Connections Policy	12,722	498,730	-	498,730	486,008	2.6%
Buck Island Sewer Phase 5	787,570	-	571,287	571,287	(216,283)	N/A
Historic District Sewer Extension Phase 4	230	575,760	3,538	579,298	579,068	0.0%
Historic District Sewer Extension Phase 5	-	523,920	3,288	527,208	527,208	0.0%
Historic District Sewer Extension Phase 6	-	646,200	6,278	652,478	652,478	0.0%
Bridge Street Streetscape	52,174	1,162,969	188,552	1,351,521	1,299,347	3.9%
Comprehensive Drainage Plan Improvements	16,580	676,400	35,326	711,726	695,146	2.3%
May River Action Plan Impervious Restoration/Water Quality Project	15,300	220,634	(29,741)	190,893	175,593	8.0%
Stoney Crest Campground/Old Palmetto Bluff Rd	175	1,100,000	-	1,100,000	1,099,825	0.0%
Pritchard Street Drainage Improvements	3,747	1,742,231	8,146	1,750,377	1,746,630	0.2%
Shults Road Drainage Improvements	-	272,888	-	272,888	272,888	0.0%
<b>Total Stormwater and Sewer</b>	<b>888,498</b>	<b>7,419,732</b>	<b>786,674</b>	<b>8,206,406</b>	<b>7,317,908</b>	<b>10.8%</b>
<b>Total CIP Expenditures</b>	<b>\$ 6,545,848</b>	<b>\$ 32,951,114</b>	<b>\$ 7,821,410</b>	<b>\$ 40,772,524</b>	<b>\$ 34,226,676</b>	<b>16.1%</b>



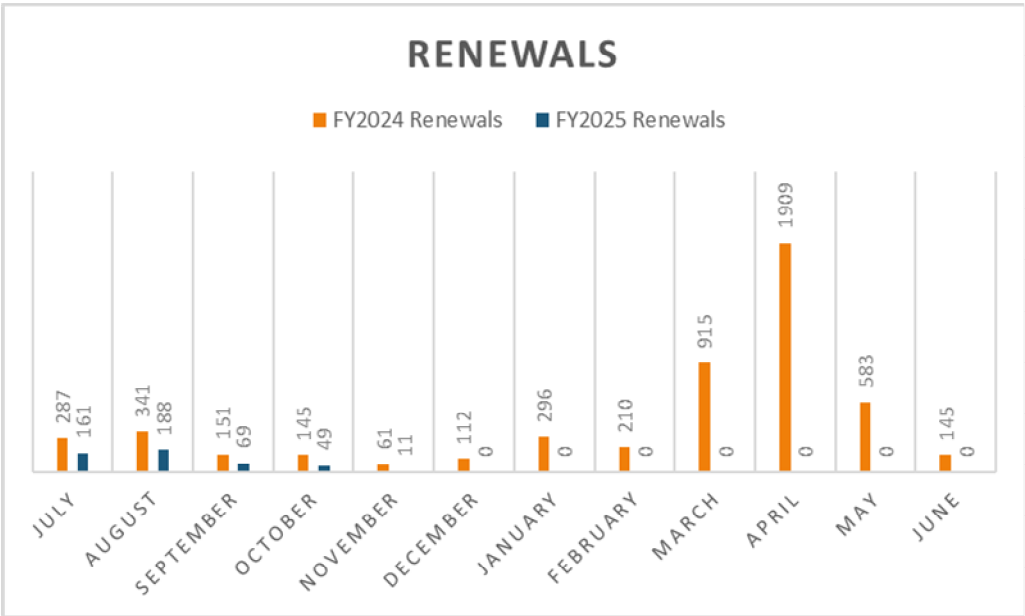
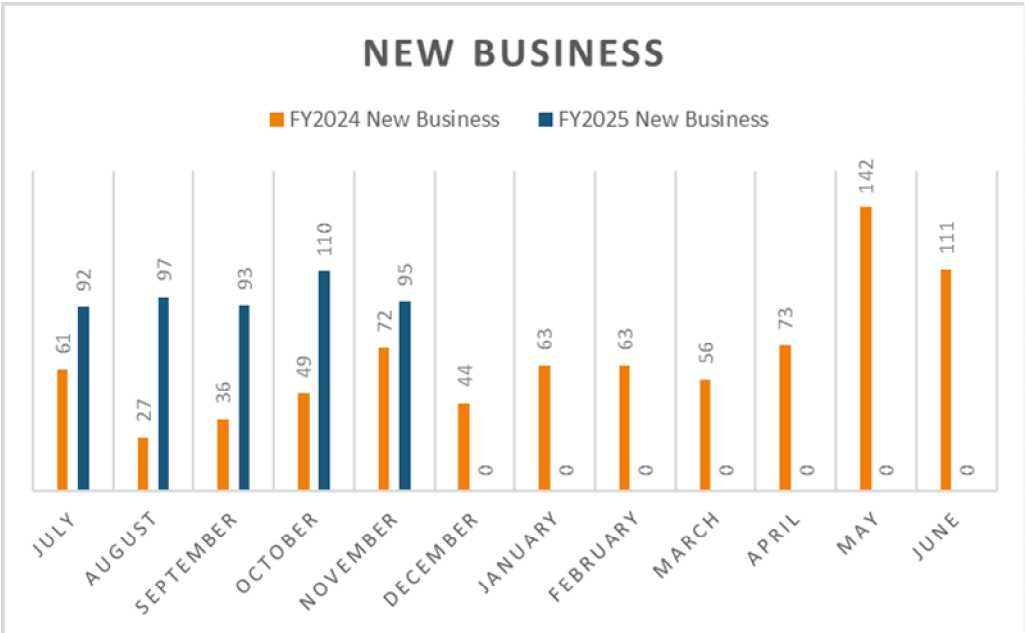
Town of Bluffton  
Actual Versus Budget  
For Period Ending November 30, 2024

Section XI. Item #1.

	Month of November 2024					Year-to-Date thru November 30, 2024				
	FY 2024	FY 2025	More/(Less)	Budget	Over / (Under)	FY 2024	FY 2025	More/(Less)	Budget	Over / (Under)
<b>Revenues</b>										
<b>Property Taxes</b>										
Real & Personal Property Tax (TIF)	\$ 1,917	\$ (98)	\$ (2,015)	\$ 2,559	\$ (2,657)	\$ 3,732	\$ 955	\$ (2,777)	\$ 4,982	\$ (4,027)
GO Bond Debt Service Property Tax	7,905	10,512	2,607	8,431	2,081	22,741	23,265	524	24,253	(988)
Total Property Tax	9,822	10,414	592	10,990	(576)	26,473	24,220	(2,253)	29,235	(5,015)
<b>Licenses &amp; Permits</b>										
Municipal Improvement District Fee	2,135	2,666	531	2,200	466	2,210	2,816	606	2,277	539
<b>Interest Income</b>	9,061	7,322	(1,739)	3,854	3,468	48,784	48,466	(318)	20,747	27,719
<b>Miscellaneous Revenues</b>	-	-	-	-	-	-	-	-	-	-
<b>Total Revenues</b>	21,018	20,402	(616)	17,043	3,359	77,467	75,502	(1,965)	52,260	23,242
<b>Other Financing Sources</b>	-	-	-	-	-	-	-	-	-	-
<b>Transfers In</b>	69,400	65,525	(3,875)	69,931	(4,406)	69,400	65,525	(3,875)	69,931	(4,406)
<b>Total Other Financing Sources &amp; Transfers In</b>	69,400	65,525	(3,875)	69,931	(4,406)	69,400	65,525	(3,875)	69,931	(4,406)
<b>Total Revenues and Other Financing Sources</b>	\$ 90,418	\$ 85,927	\$ (4,491)	\$ 86,975	\$ (1,048)	\$ 146,867	\$ 141,027	\$ (5,840)	\$ 122,191	\$ 18,836
<b>Expenditures</b>										
<b>Series 2014 TIF Bonds Debt Service</b>										
Principal	\$ 873,554	\$ 896,386	\$ 22,832	\$ 896,386	\$ -	\$ 873,554	\$ 896,386	\$ 22,832	\$ 896,386	\$ -
Interest	34,698	23,429	(11,269)	23,429	-	34,698	23,429	(11,269)	23,429	-
<b>Series 2022 TIF Bonds Debt Service</b>										
Principal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Interest	-	-	-	-	-	-	-	-	-	-
<b>Series 2020 GO Bonds Debt Service</b>										
Principal	-	-	-	-	-	-	-	-	-	-
Interest	-	-	-	-	-	67,150	61,025	(6,125)	61,025	-
<b>Series 2020A GO Bonds Debt Service</b>										
Principal	-	-	-	-	-	-	-	-	-	-
Interest	69,400	65,525	(3,875)	65,525	-	69,400	65,525	(3,875)	65,525	-
<b>Miscellaneous</b>	-	-	-	-	-	-	-	-	-	-
<b>Total Expenditures</b>	977,652	985,340	7,688	985,340	-	1,044,802	1,046,365	1,563	1,046,365	-
<b>Other Financing Uses</b>										
Transfers Out to Capital Improvements Program Fund	-	1,400,000	1,400,000	-	1,400,000	-	1,400,000	1,400,000	-	1,400,000
<b>Total Transfers</b>	-	1,400,000	1,400,000	-	1,400,000	-	1,400,000	1,400,000	-	1,400,000
<b>Total Expenditures and Other Financing Uses</b>	\$ 977,652	\$ 2,385,340	\$ 1,407,688	\$ 985,340	\$ 1,400,000	\$ 1,044,802	\$ 2,446,365	\$ 1,401,563	\$ 1,046,365	\$ 1,400,000

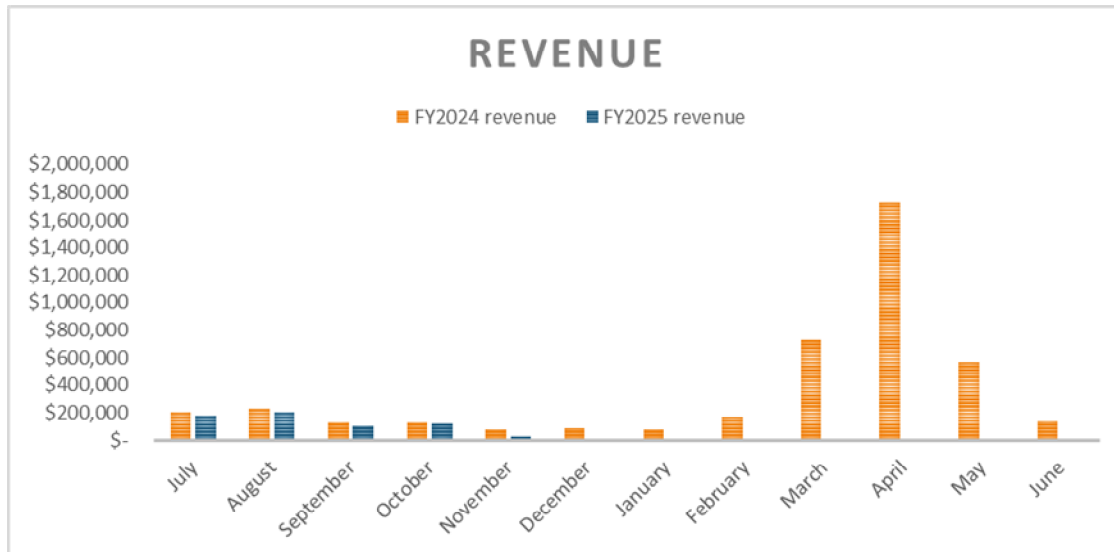
Business License Statistics:

Business License applications for FY2025 through November total 965 (487 new business and 478 renewals) compared to FY2024’s total of 1,284 (299 new business and 985 renewals).





Business license renewals reflect a decrease of 82% or 50 and revenue collections decreased 72% or \$22,584 for the month of November when comparing to last year. This decrease continues to be due to the efficiencies the new business license software, Evolve, which significantly reduced the huge backlog of pending renewals the Business License Division would have to process well past the renewal due date. Business license revenue generated through permits increased by 50% or \$14,968.



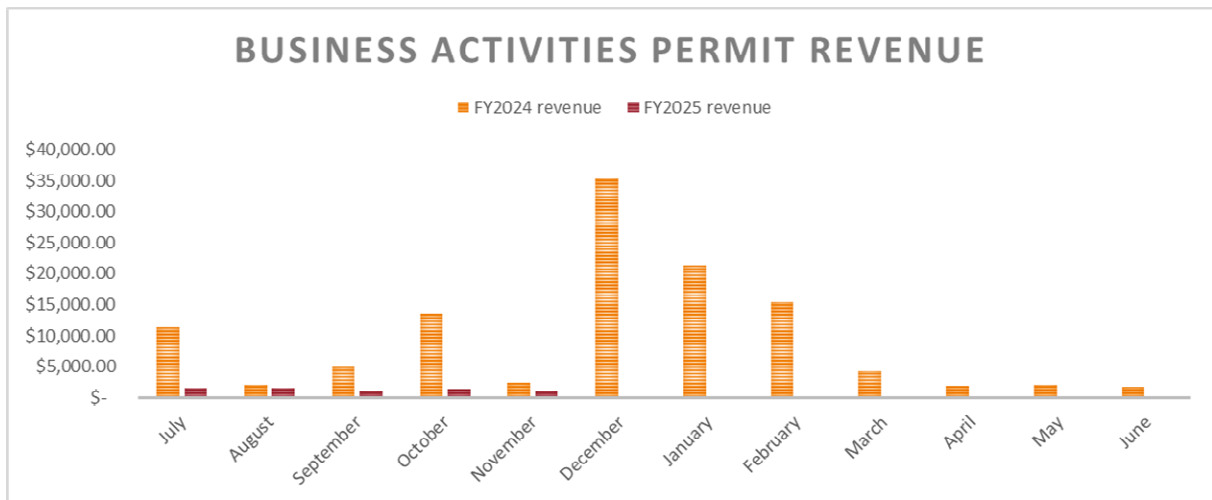
The amended ordinance that went into effect January 1<sup>st</sup>, 2019 included additional incentives for new businesses and businesses with multiple locations within the Town. For the 2024 business license renewals, six hundred, seventy-six (676) business have qualified for the Town's incentives for a total revenue reduction of \$220,022.

Incentive	Number of Businesses	Gross Income Deducted	Total Incentive Amount
10%	190	\$ 7,598,058	\$ 10,472
20%	243	11,987,652	16,239
40%	173	9,852,200	14,149
CAP	9	161,674,934	163,044
2+	61	16,976,813	16,118
<b>Grand Total</b>	<b>592</b>	<b>\$ 208,089,657</b>	<b>\$ 220,022</b>

Rate Class	Number of Businesses	Total Incentive Amount
1	170	\$ 165,133
2	15	3,710
3	43	1,365
4	96	6,031
5	61	5,615
7	245	17,944
8.1	40	4,694
8.51	1	51
8.6	1	300
9.3	4	15,179
<b>Grand Total</b>	<b>676</b>	<b>\$ 220,022</b>

Included in the Business License Revenue are permits for both Mobile Vending and Short-Term Rental.

- Mobile Vending Permit (MVP): \$400 for a calendar year
  - One (1) 2024 MVPs issued in October
  - Twenty-eight (28) are compliant
  - One (1) is non-compliant
  - None are pending
  - There are twenty-nine (29) identified Mobile Vending businesses
- Short-Term Rental Permit (STRP): \$325 for a calendar year
  - Two (2) 2024 STRPs issued in November
  - Two hundred and eleven (211) STRPs are compliant with a permit
  - Eighty (80) are non-compliant
  - Nine (9) are in-process
  - There are three hundred (300) properties identified



Grant Program / Name	Federal/ State/ Other	Grant #	Town Project Description	Department	Status	Amount Funded by Grant	Town's Match	Total Project Amount	Date of Award	Grant Start Date	Grant Expiration
South Carolina Infrastructure Investment Program (SCIIP)	Federal	A-23-C015	Stoney Crest area septic to sewer; local match split equally among Town, Beauf.Co, and BJWSA.	Stormwater	AWARDED TO BJWSA	\$ 5,925,000.00	\$1,975,000 divided equally among Town, County, and BJWSA	\$7,900,000.00	04/27/23	04/24/23	6/1/2026
American Rescue Plan Act (ARPA) grant from the State and Local Fiscal Recovery Fund (SLFRF)	Federal	SLT-5134	coronavirus recovery, Entitlement community with Tier 5 reporting	Finance	Active	\$ 1,982,471.00	none	\$1,982,471.00	05/27/21	03/03/21	obligated by 12/31/2024 expended by 12/31/2026
Community Development Block Grant (CDBG)	Federal	4-A-19-001	BIS sanitary sewer, Phase 5	CIP	Active	\$ 500,000.00	\$ 3,002,282.00	\$3,502,282.00	10/14/19	10/14/19	12/30/2023
Land and Water Conservation Fund	Federal	45-01131	New Riverside Barn Park	CIP	Active	\$ 500,000.00	\$ 500,000.00	Phase I > \$1M	10/18/21	10/19/21	10/31/2023; extended to 7/31/2024
Section 319(h) Nonpoint Source Pollution, Assistance Program	Federal	EQ-0-263	May River Watershed Action Plan Phase IV; sewer connections (Poseys Court, Pritchard Street, Bridge Street)	Stormwater / CIP	Active	\$ 365,558.36	\$ 243,830.00	\$ 609,388.36	06/21/19	09/25/19	7/24/2023; extended to 9/30/2024
Nonpoint Source Implementation Program - Section 319(h) of the Clean Water Act	Federal	EQ-3-544	May River Watershed Action Plan, Phase VI stormwater retrofit (Pritchard St)	Stormwater / CIP	Active	\$ 124,577.00	\$ 83,398.00	\$ 207,975.00	11/16/22	11/16/22	11/15/2025
Nonpoint Source Implementation Program - Section 319(h) - Clean Water Act	Federal	EQ-4-318	May River Phase VII - HD Sewer Phases 4-6	CIP	Active	\$ 529,850.00	\$ 367,920.00	\$ 897,770.00	6/16/2023	2/29/2024	9/30/2027
FY24 COPS Technology and Equipment Program Invitational Solicitation	Federal	15JCOPS-24-GG-02292	equipment for PD	Police	Active	\$ 1,348,178.00	\$ -	\$1,348,178.00	9/30/2024	3/9/2024	3/9/2026

FY24 Park and Recreation Development Fund (PARD)	State	Project Number 2023057	New River Trail Restroom Shelter	CIP	Active	\$ 26,000.00	\$ 6,500.00	\$ 32,500.00	05/08/23	05/08/23	5/8/2026
School Safety Program FY24 (School Resource Officer)	State	SR-076-C0702-24	SRO funding for six officers	Police	Active	\$ 893,422.29	none	\$ 893,422.29	6/16/2023	7/1/2023	6/30/2024
FY24 State Appropriation Act	State	none	New River Linear Trail	CIP	Active	\$ 2,000,000.00	\$ 705,172.00	\$2,705,172.00	10/16/2023	10/16/2023	10/16/2026
FY24 State Appropriation Act	State	none	Agility Course	Police	Active	\$ 50,000.00	none	\$ 50,000.00	9/8/2023	9/8/2023	6/15/2024
StimulateSC	State	2024SSC-01	DRCI Artificial Intelligence Training Program	DRCI	Active	\$ 10,450.00	\$ 10,450.00	\$ 20,900.00	1/2/2024	1/15/2024	10/15/2024
National Opioid Guaranteed Political Subdivision Subfund	State	none	Opioid settlement money	Police	Active	\$ 30,400.00	none	\$ 30,400.00	7/15/2024	7/1/2024	6/30/2024
School Safety Program FY25 (School Resource Officer)	State	SR-113-C0702-25	continued funding for six SROs	Police	Active	\$ 522,025.00	none	\$ 522,025.00	8/6/2024	7/1/2024	6/30/2025
South Carolina Power Team Site Readiness Fund (SRF) Grant	Local		economic development for Buckwalter MCIP, Building A	Exec	Active	\$ 1,000,000.00	\$ 2,715,365.00	\$4,045,365.00	6/25/2024	Sept 2024 need date of fully executed agreement	
FY25 State Appropriation Act	State	none	K9 program	Police	Active	\$ 50,000.00	none	\$ 50,000.00	7/24/2024	7/1/2024	6/15/2025
						\$ 8,882,931.65					

Building Resilient Infrastructure and Communities (BRIC)	Federal		Historic District drainage	Watershed	submitted 12/14/2023	\$ 278,550.00	\$ 30,950.00	\$ 309,500.00			36 months from date of award
Sen Graham appropriation FFY25 / National Park Service	Federal		New River Linear Trail ADA Enhancement Phase II	CIP	submitted 4/29/2024; look for Congress to pass appropriation legislation between Oct and Dec 2024	\$ 500,000.00	\$ 1,492,056.00	\$1,992,056.00			

	As of November 2024					
	Bluffton Police Department Benevolence Fund		Mayor's Stay Safe Bluffton Scholarship Fund		Town of Bluffton Parks & Public Art Fund	
	FY through		FY through		FY through	
	Nov. 2024	Nov. 2024	Nov. 2024	Nov. 2024	Nov. 2024	Nov. 2024
Beginning Balance	\$ 110,844.09	\$ 100,846.75	\$ 17,263.59	\$ 16,140.72	\$ 3,843.73	\$ -
Contributions & Investement Activity						
Contributions to Fund	\$ 592.78	\$ 9,171.79	\$ 3,472.93	\$ 4,378.34	\$ -	\$ 3,800.00
Interest & Dividend Income	140.88	912.24	24.49	147.53	4.87	20.78
Investment Income & Losses	242.47	1,273.01	42.14	207.79	8.39	36.21
Total Contributions & Investment Activity	976.13	11,357.04	3,539.56	4,733.66	13.26	3,856.99
Expenses						
Distributions - Grants	-	-	-	-	-	-
Distributions - Program Expenses	-	-	-	-	-	-
Fees - Administrative & Investment	-	381.11	-	61.22	-	-
Fees - Credit Card Processing	13.34	15.80	75.40	85.41	-	-
Total Expenses	13.34	396.91	75.40	146.63	-	-
Net Change to Fund Balance	\$ 962.79	\$ 10,960.13	\$ 3,464.16	\$ 4,587.03	\$ 13.26	\$ 3,856.99
Pending Contributions						
Total Pending Contributions		\$ -		\$ -		\$ -
Pending Expenses						
Total Pending Expenses		-		-		-
Projected Ending Balance		\$ 111,806.88		\$ 20,727.75		\$ 3,856.99

## TOWN COUNCIL



### STAFF REPORT Human Resources Department

<b>MEETING DATE:</b>	January 14, 2025
<b>PROJECT:</b>	December 2024 Activity Report
<b>PROJECT MANAGER:</b>	Anni Evans, Director of Human Resources

#### **Human Resources Summary:**

##### **New Hires: 2**

Sam Barrow  
Title: Senior Planner  
Start Date: December 18, 2024  
Department: Growth Management

Andy Zuviri  
Title: Intern: Finance  
Start Date: December 12, 2024  
Department: Finance Department

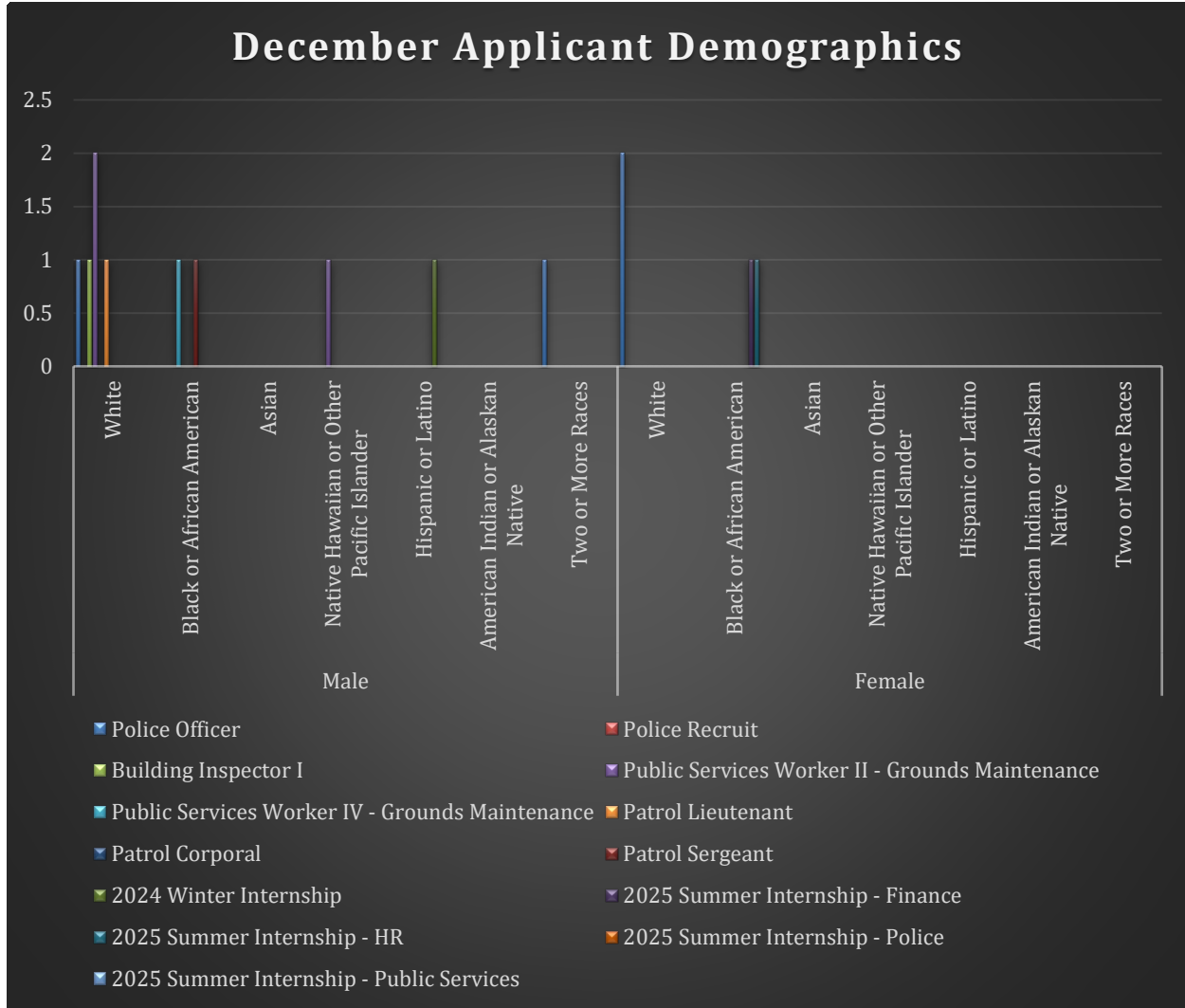
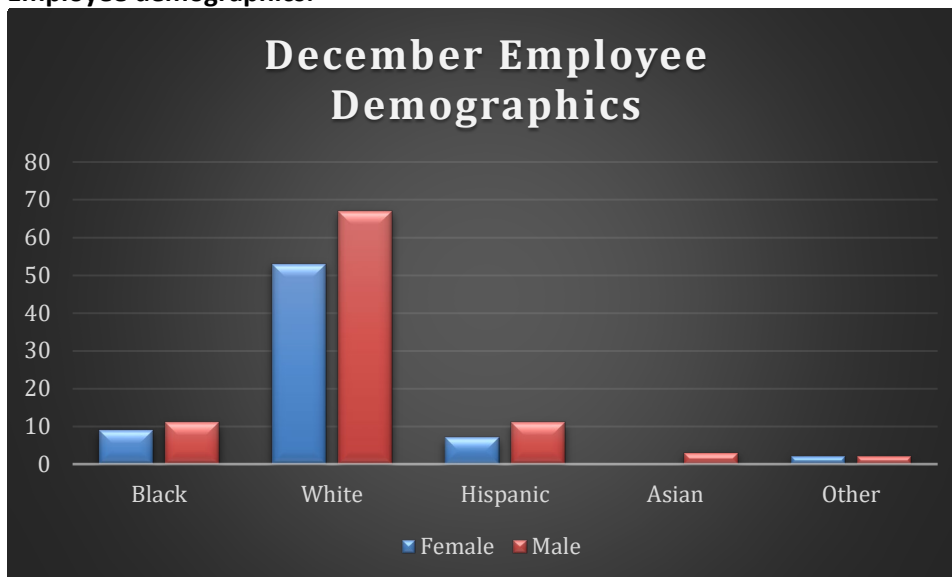
##### **Exits: 1**

Danielle Boyd  
Title: Police Recruit  
Date: December 18, 2024  
Department: Police

##### **Jobs posted:**

Police Officer  
Police Recruit  
Police Patrol Corporal  
Police Patrol Sergeant  
Police Patrol Lieutenant  
Building Inspector I  
Public Services II, IV Grounds Maintenance  
Winter / Summer Intern

- Birthday/Anniversary Celebration – December 14 Hot Cocoa Bar & Cookie Exchange
- Christmas Door Decorating Contest
- Wellness Event: Stress Management Presentation: Holiday Edition
- Performance Evaluations 2024
- Holiday Lunches / Celebrations
- Internship 2024 / 2025 Preparation

**Candidate demographics:****Employee demographics:**



TOWN COUNCIL



STAFF REPORT  
Municipal Court Department

MEETING DATE:	January 14, 2025
PROJECT:	November Activity Report
PROJECT MANAGER:	Lisa Cunningham, Clerk of Court

Court Summary

Town of Bluffton Municipal Court convenes every Tuesday morning. In November 2024 a total of four morning sessions. The Municipal Court currently has 366 cases pending which is a combination of 313 criminal/traffic cases, 32 jury trial requests, and 21 defendants enrolled in alternative programs.

Indigent Defense cases

Town of Bluffton currently contracts with the 14<sup>th</sup> Circuit Public Defenders Office to provide Indigent Defense Counsel to all defendants who meet the Annual Federal Poverty Guidelines. Year to date our Indigent Defense Attorney has 760 cases which is a combination of 51 pending and 709 disposed on the docket as of November 2024.

Alternative Programs

Defendants are sometimes offered the opportunity to complete Alternative Programs in lieu of convictions on their traffic and/or criminal record.

There are currently 5 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 9 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 6 active participants. The TEP Program cost is \$280.00 plus the cost of online driving class. It is designed for offenders who have pending moving violations except for Driving under the Influence, Driving under Unlawful Alcohol Concentration, and Reckless Driving.

Alcohol Education Program referred to as AEP has 0 active participants. AEP is only inclusive for alcohol related charges such as minor in procession of alcohol or false identification for

offenders between the ages of 17-21. AEP costs \$250.00 plus the cost of online driving class and alcohol education classes.

Pre-Trial Intervention referred to as PTI has 1 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 November 2024

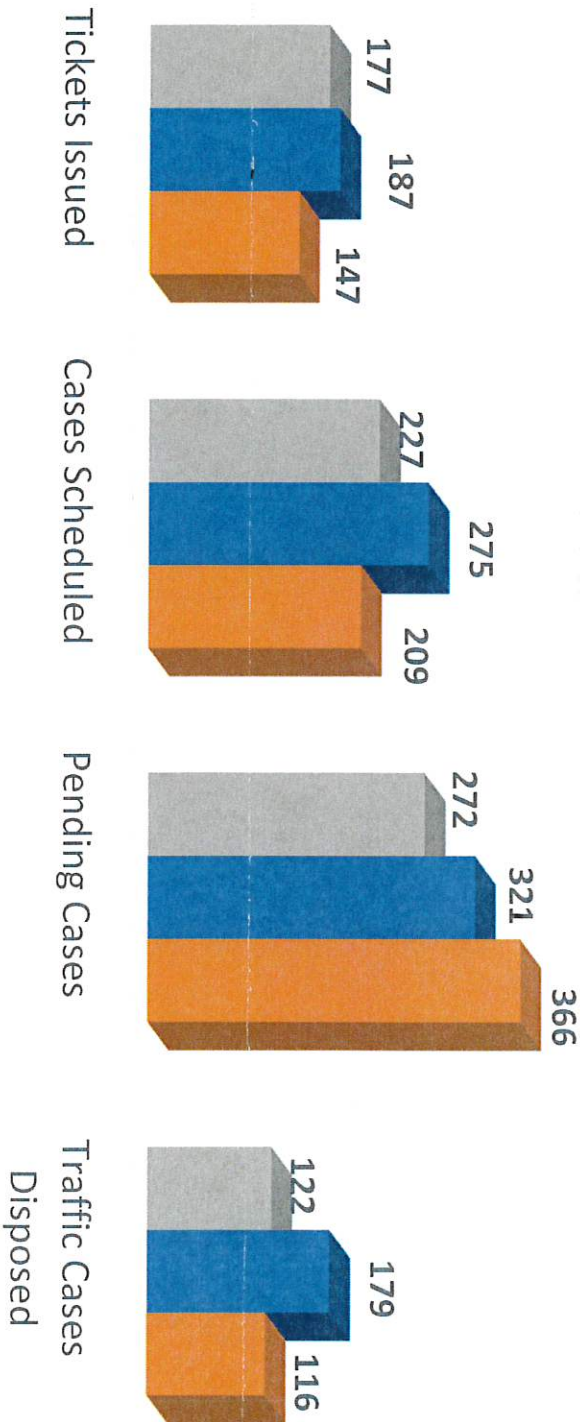
Presented by:

Lisa Cunningham, Clerk of Court

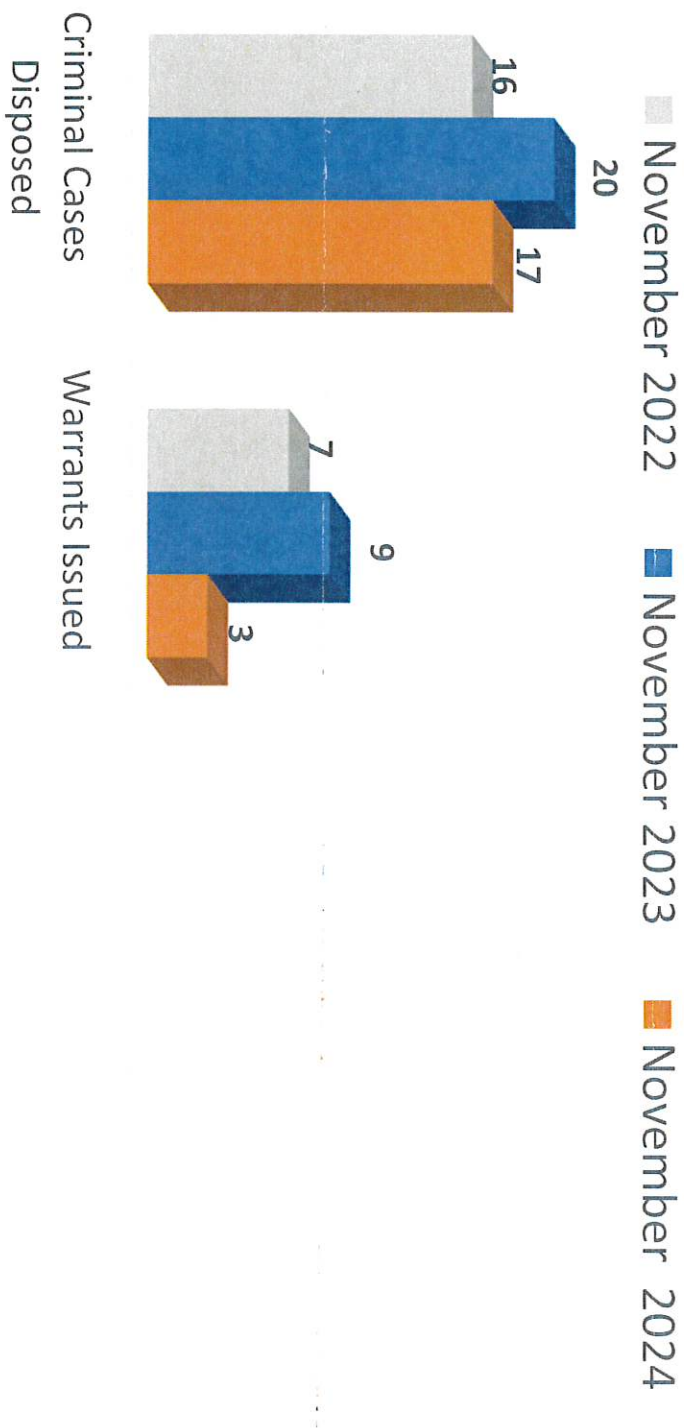
# Town of Bluffton Municipal Court



■ November 2022   ■ November 2023   ■ November 2024



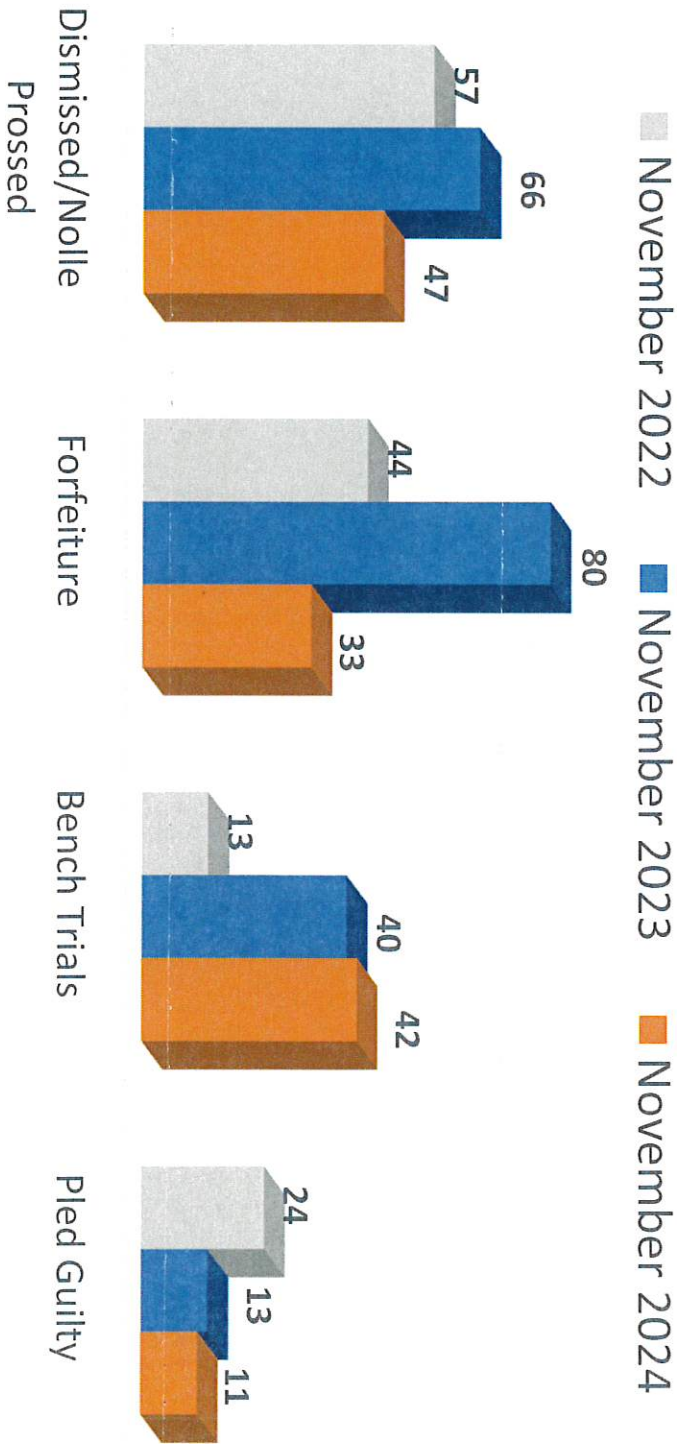
# Town of Bluffton Municipal Court







# 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>	January 14, 2025
<b>SUBJECT:</b>	Projects and Watershed Resilience Department Monthly Report
<b>PROJECT MANAGER:</b>	Kimberly Washok-Jones, Director of Projects and Watershed Resilience

### **CAPITAL IMPROVEMENTS PROGRAM (CIP) UPDATE**

#### **PATHWAYS**

##### **1. New River Linear Trail**

- Bathroom, well, safety cameras and entry gate **completed**.
- **Next Steps**
  - Continue engineering design and permitting for Phases 1 and 2.
  - Negotiations with Central Electric and Santee Cooper for cost sharing terms and bridge maintenance continue.
  - Continue coordination of boardwalk connection for Four Seasons.
  - Submit Encroachment Permit and Phase 1 construction contract to Town Council for approval winter 2025.

#### **SEWER & STORMWATER**

##### **1. Buck Island-Simmons ville Sewer (Phases 5A-D)**

- Sewer mainlines and laterals are constructed.
- **Next Steps**
  - BJWSA completes review and accepts the system as their asset.

##### **2. Historic District Sewer Extension Phases 4 through 6 – Lawrence, Green and Water Streets**

- Design for Phases 4, 5, & 6 received BJWSA review.
- DRC reviewed on 9/18/24.
- **Next Steps**
  - BJWSA to submit to SCDES for permit to construct.
  - Construction implementation is pending permit approvals and easement acquisitions.
  - Prepare and issue an IFB/RFP in January.

**3. May River Watershed Action Plan Impervious Restoration Water Quality Projects**

- Initial site investigations including geotechnical investigations and reports are complete for 8 of the 11 participating project sites.
- Fee-in-Lieu Fund establishment/administration Policy Document has been completed. Comments from Finance have been incorporated into Final Draft. Master Fee Schedule updates have been drafted.
- Initial Property Owner contacts for 15 Additional Sites within municipal limits have been made and concept plan development is in process.
- **Next Steps**
  - Preliminary design of each of the 8 original sites has been made, under review, and being utilized for proposed FY26 CIP Projects.
  - Fee-in-Lieu discussion proposed for January Town Council Workshop.
  - Adoption of Fee-in-Lieu as part of FY26 Master Fee Schedule.

**4. Comprehensive Drainage Plan Improvements**

- Consultant field work to identify and assess condition of stormwater assets in Crooked Cove and Guerrard Cove **completed** 5/12/24.
- Processing of field data **complete**.
- Development of 2D Hydrologic/Hydraulic Model has been completed and pending flow data calibration.
- Flow monitors at each Cove location have been installed. Data collected will be used to calibrate 2D Hydrologic/Hydraulic model.
- **Next Steps**
  - Final review of Individual Stormwater Asset Reports for Heyward Cove identifying results and needed work by asset owner (SCDOT, County, School District, Town and private) **completed**. Letter to accompany report to Asset Owners being drafted for review, approval, and issuance.
  - Following Council feedback on 10/31/24 Strategic Planning, staff is developing the scope for assessment of the Rose Dhu Creek drainage area.

**5. Stoney Creek/Palmetto Bluff Sewer Partnership**

- BJWSA's 2022 updated cost-estimate for the project from BJWSA increased to \$7.2 million + contingencies.
- 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>.

**HISTORIC DISTRICT IMPROVEMENTS****6. Boundary Street Lighting**

- Dominion to install street lighting on the west side of Boundary Street.
- **Next Steps**
  - Dominion installation of street lighting in FY25.

**7. Squire Pope Carriage House Welcome Center**

- Building construction and landscape improvements **complete**.
- Staff furniture was installed.
- **Next Steps**
  - COO department has moved into the building.
  - Ribbon cutting tentatively scheduled for February 2025.

**8. Bridge Street Streetscape**

- Phase 1 **complete**.
- Initial stakeholder meeting with Montessori and Hargray for Phase 2 **complete**.
- Easement donations approved by Town Council 11/12/24.
- **Next Steps**
  - Continue engineering design for SCDOT permitting.
  - Continue stakeholder meetings.
  - Continue planning and design for underground power and lighting plan.

**9. Boundary Street Streetscape**

- Engineering design is 80% complete and submitted agencies for review. Land disturbance permit approved by SCDES.
- Approved change order with Thomas and Hutton for additional structural design services for the Lawrence Street outfall.
- Completed geotechnical services with GHD for the Lawrence Street outfall.
- **Next Steps**
  - Evaluate alternative outfall locations at Green Street and Lawrence Street.
  - Continue coordinating with Dominion Energy to obtain underground power layout and facility locations.
  - Continue with engineering design and permitting.
  - Prepare easement exhibits and begin appraisals in FY25.
  - Construction begins in calendar year 2025, subject to acquisition of required easements.

**10. Calhoun Street Streetscape**

- Completed ROW surveys.
- Preliminary engineering design is 45% complete.
- Awaiting underground conversion plans from Dominion Energy.
- **Next Steps**
  - Continue negotiations with May River Road property owners for main transmission line easements. Once the main transmission line easements have been completed, then continue with engineering design through FY25.
  - Prepare easement acquisition plats for Phase 1 in FY25 and begin easement acquisition.
  - Phased construction is planned to begin in CY26 pending budget approval and acquisition of all required easements.

**11. Pathway Pedestrian Safety Improvements**

- **Completed** Historic District crosswalk study identifying and prioritizing future intersection/crosswalk improvements to meet ADA compliance.
- Phase 1 ADA sidewalk improvements along Goethe Road **completed** on 1/23.
- Phase 2 design plans **completed** for the remainder of the Historic District.
- Acceptance of Phase 2 easement donations approved at 10/8/24 Town Council meeting
- Phase 2 contract award approved at 12/10/24 Town Council.
- Phase 3 analysis of areas outside of the Historic District finalized to identify sites for design.
- **Next Steps**
  - Execute contract and conduct pre-construction meeting for Phase 2 construction. Anticipated to begin March 2025.
  - Generate RFQu for Phase 3 design and construction drawings.

**12. Pritchard Street Drainage Improvements**

- Project scope includes streetscape elements, pedestrian connectivity, street lighting and traffic calming evaluation.
- Permit applications have been submitted. DRC Public Project was held on 3/28/2024.
- Met with school district on 9/6/24 to discuss project status, easements, schedule, project phasing needs, and parking lot Cost Share Agreement.
- Presented to School District Operations Committee on 9/19/24 to review project scope, easement acquisition needs, schedule, phasing, and parking lot cost share agreement (to be drafted, finalized and signed by parties). Easement exhibit has been reviewed by School District and comments incorporated.
- Project Public Meeting held October 24, 2024. Public meeting comments have been reviewed, finalized and update issued to Public Meeting attendees.
- **Next Steps**
  - Coordinate approval for proposed improvements with Beaufort County School District and Beaufort County on pool operation impacts.
  - Consultant responding to design and permit review comments for 100% design submittal.
  - Finalize easement acquisition needs to begin acquisition. Easement documents submitted and pending Legal review.
  - Follow-up/complete permitting submissions and bid document formulation.
  - Continue street lighting agreement coordination with Dominion.

**PARK DEVELOPMENT****1. Oyster Factory Park**

- Civil construction and landscape of event area are **complete**.
- Ward Edwards providing bid documents for grading, drainage and paving for the food truck access drive.
- Contractor preparing quotes for additional services for the repairs to the existing pavilion and other drainage improvements.

- **Next Steps**
    - Bid pavilion, paving and drainage improvements in January 2025
    - Prepare plans for the restroom expansion and other FY25 improvements.
- 2. Oscar Frazier Park**
- Rotary Center hardscape improvements **complete** and under 1 year maintenance agreement.
  - Splash Pad opened October 2024 and additional improvements are planned for the winter of 2025.
  - **Next Steps**
    - Complete additional improvements to the splash pad and pavilion.
    - Obtain quotes for shade structure at the playground.
- 3. New Riverside Barn/Park**
- Restrooms and trellises are **complete**.
  - Playground equipment installation, P I P, synthetic turf and pavilions are **complete**. The playground landscape is **complete**. Barn framing **completed**. The building is dried in. The mechanical rough-in is well underway. Window and door installation is almost complete. Exterior trim and siding have started. Courtyard / firepit area have started.
  - **Next Steps**
    - Nix Construction to continue all the above.
    - Begin planning and design of PS maintenance facility in 2025.
- 4. New Riverside Village**
- Lighting contract approved at 4/9/24 Town Council.
  - Design plan approved by POA/Developer.
  - **Installed** trellis swings, dog stations, trash cans and lighting conduit.
  - **Installed** Rules sign and light poles and fixtures.
  - Wayfinding signage design completed.
  - **Next Steps**
    - Install wayfinding signage.
    - Punchlist items with Dominion Energy for light pole installations.
- 5. Miscellaneous Park Improvements**
- Shade sail installation **completed** at Buckwalter Place Park playground.
  - DuBois Park pavilion repair **completed** in October 2024.
  - **Next Steps**
    - Continue design of landscape and shade structure enhancements at various town parks in 2025.
    - Obtain quote to repair bulkhead at Wright Family Park.
- 6. Buckwalter Place Park Improvements**
- Plans presented to Town Council on 1/16/24 and update provided on 10/15/24.
  - Phase 1 **completed**.



- Conceptual landscaping plan and Sabal palm installation **complete**.
- Park and restroom construction documents **completed**.
- **Next Steps**
  - Phase 2 bid posting on 1/2/2025.

## **TOWN FACILITIES AND MISCELLANEOUS PLANNING**

### **1. Town of Bluffton Affordable Housing Project – The May**

- **Next Steps**
  - Provide financial assistance to joint venture partner, WorkForce State of Mind, to plan, design, permit and construct 12 Affordable/Workforce Housing units at 1095 May River Road.
  - Staff continues to review progress and applications for payment.

### **2. Law Enforcement Center Facility Improvements**

- PD **completed** improvements to evidence room.
- **Next Steps**
  - Begin design in FY25 for impound lot and canine facility.
  - Further work pending results of space needs assessment by Creech and Associates.

### **3. Sarah Riley Hooks Cottage**

- Meadors Architectural Design has been submitted for final review.
- Final site plan **complete** and distributed to engineers for final design.
- Presented plans for a pre-application meeting on 8/16/2024 and Public Project Review on 11/8/2024.
- Completed exempt plat approval and recording.
- **Next Steps**
  - Bid and begin restoration construction of cottage in mid-year FY25.
  - Begin site and landscape development construction in FY26.
  - Finalize lighting plan.

### **4. Ghost Roads**

- Surveying and easement exhibits are **complete**.
- Bridge Street, Pritchard, Colcock, Water, Pope and Allen Quit Claim Deeds are **complete**.
- **Next Steps**
  - Continue acquisition of remaining Quit Claim Deeds for Historic District Ghost Roads or have legal initiate quiet title proceedings.

### **5. Document Management**

- RFP contract was awarded in March 2022 and electronic Document Management System (DMS) is live.
- Documents for 9 departments have been transitioned to DMS.
- **Next Steps:**
  - Historical documents for the remaining departments will transition through FY26.

**6. Network Infrastructure**

- Replaced core switches at Town Hall and the Law Enforcement Center.
- Replaced two VMWare hosts for a more stable server environment.
- Migration of Munis and Energov systems to a hosted environment completed.
- Implemented ExecuTime to replace Intime.
- **Next Steps:**
  - Replacing two more VMWare hosts.

**WATERSHED MANAGEMENT UPDATE****1. Administrative Update**

- Beth Lewis attended the Beaufort County Stormwater Utility Board Meeting on behalf of Bill Baugher on 12/11/24.
- Beth Lewis participated in a Port Royal Sound Foundation Water Quality Monitoring Network Roundup Meeting on 12/12/24.
- Andrea Moreno and Beth Lewis volunteered with the Bluffton Self Help Toy Store as part of the Town's Corporate Social Responsibility (CSR) Program on 12/16/24.
- Staff worked with IT to update the Town's Sanitary Sewer Overflow (SSO) listserv used by BJWSA for critical overflow notifications.
- Dr. Tweel, the lead Principal Investigator on the "May River Baseline Assessment Update," provided a "May River Watershed Landcover Assessment Report" in December 2024. This data will inform future policies and programs considered by the Town.

**2. 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*****3. May River Watershed Action Plan Implementation Summary – *Attachment 2***

- Water Environmental Consultants (WEC) is finalizing flow monitoring reports for the Rose Dhu Creek, Stoney Creek, and Palmetto Bluff subwatersheds.

**4. Resiliency**

- College of Charleston and SC Sea Grant are completing a Resiliency Analysis for the Town including modeling storms and sea level rise, reviewing the Town's UDO, Municode, SC Code of Ordinances, and Stormwater Design Manual, and stakeholder engagement through surveys and events. A final report is anticipated early 2025.
- Staff is coordinating with SC Sea Grant to discuss potential placement of a SECOORA water level sensor(s) at the Calhoun Street dock and other Town locations.
- Wetlands and Resiliency Ordinances:
  - January 2025: Town Council consideration of MSA task authorization for data gathering to develop Wetlands and Resiliency Ordinances.

**5. Municipal Separate Storm Sewer System (MS4) Program Update**

- Staff presented proposed amendments to the Southern Lowcountry Stormwater Design Manual and Post-Construction Stormwater Ordinance to the May River

Watershed Action Plan Advisory Committee on 12/05/24. These amendments will go in front of Town Council for adoption via resolution on 2/11/25.

- Staff have begun working on the 2024 MS4 Annual Report with an anticipated submittal to the South Carolina Department of Environmental Services (SCDES) in Spring of 2025.

**6. MS4 Minimum Control Measure (MCM) - 1 Public Education and Outreach, and MS4 MCM - #2 Public Participation and Involvement**

- The May River Watershed Action Plan Advisory Committee (WAPAC) meeting was held 12/05/24. The committee adopted quarterly 2025 meeting dates, recommended proposed updates to the Stormwater Design Manual, and recommended the Town develop wetland and resiliency ordinances in FY25 and a wetland restoration program in FY26. – **Attachment 3**

**7. MS4 MCM – #3 Illicit Discharge Detection and Elimination**

- Stormwater Infrastructure Inventory Map – **Attachment 4a**
- *E. coli* Concentrations Trend Map – **Attachment 4b**
- Monthly, Microbial Source Tracking (MST) Maps – **Attachments 4c and 4d**
  - SC Department of Environmental Services (SCDES) collects MST samples for the Town concurrently with their routine shellfish harvesting water quality sampling at stations 19-19, 19-19A, 19-19B, 19-19C, and 19-24. December SCDES water quality sampling was cancelled by the department.
- Illicit Discharge Investigations – **Attachment 4e**

**8. MS4 MCM – #4 Construction Site Stormwater Runoff Control – Attachment 5**

**9. MS4 MCM – #5 Stormwater Plan Review and Related Activity – Attachment 6**

**10. MS4 MCM – #6 Good Housekeeping (Staff Training/Education)**

- Nicole Wright and Konnor Harrell received their Post-Construction BMP Inspector certification on 12/12/24.
- Kim participated in the National Sea Grant Site Visit and evaluation of SC's Sea Grant program on 12/11/24.

**11. MS4 MCM – #6 Good Housekeeping (Ditch, Drainage and Roadside Maintenance)**

- Public Services performed weekly street sweeping on Calhoun Street, Highway 46, Bruin Road, May River Road, Pin Oak Street, and curbs and medians on Simmonsville and Buck Island Roads.
- Performed ditch inspections.
  - Arrow ditch (2,569 LF)
  - Red Cedar ditch (966 LF)
  - Buck Island roadside ditch (15,926 LF)
  - Simmonsville roadside ditch (13,792 LF)
- Ongoing roadside mowing, litter clean-up and maintenance of Masters' Way, McCracken Circle, Hampton Parkway, Buck Island and Simmonsville Roads, Goethe

Road, Shults Road, Jason and Able Streets, Whispering Pine Road, May River Road, and Eagles Field.

**12. Citizen Drainage, Maintenance, and Inspections Concerns Map – Attachment 7**

**13. Citizen Request for Watershed Management Services & Activities – Attachment 8**

**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
3. MS4 Minimum Control Measures #1 and #2 – WAPAC Agenda 12/5/24
4. MS4 Minimum Control Measure #3 – Illicit Discharge Detection and Elimination
  - a. Stormwater Infrastructure Inventory Map
  - b. *E. coli* Concentrations Trend Map
  - c. Microbial Source Tracking Trend Map – All Sources
  - d. Microbial Source Tracking Map – Human Sources
  - e. Illicit Discharge Investigations
5. MS4 Minimum Control Measure #4 – Construction Site Stormwater Runoff Control
6. MS4 Minimum Control Measure #5 – Stormwater Plan Review and Related Activity
7. Citizen Drainage, Maintenance, and Inspections Concerns Map
8. Citizen Request for Watershed Management Services and Activities Map
9. CIP Master Project Schedules

	19-19				19-19A				19-19B				19-19C				19-24				19-16			
	2021	2022	2023	2024	2021	2022	2023	2024	2021	2022	2023	2024	2021	2022	2023	2024	2021	2022	2023	2024	2021	2022	2023	2024
	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)	Fecal Coliform (MPN)
December	79.0	33.0	33.0	NS	49.0	49.0	33.0	NS	4.5	17.0	7.8	NS	17.0	49.0	13.0	NS	6.8	6.8	7.8	NS	7.8	13.0	17.0	NS
November	33.0	33.0	13.0	170.0	33.0	13.0	2.0	130.0	7.8	7.8	4.5	170.0	4.0	4.5	4.5	49.0	4.5	6.1	2.0	79.0	2.0	13.0	4.5	33.0
October	49.0	23.0	33.0	49.0	26.0	46.0	23.0	17.0	13.0	13.0	17.0	13.0	23.0	23.0	33.0	2.0	23.0	11.0	2.0	11.0	17.0	14.0	6.8	17.0
September	33.0	540.0	23.0	33.0	11.0	350.0	13.0	240.0	17.0	350.0	13.0	13.0	13.0	170.0	7.8	7.8	2.0	79.0	17.0	22.0	11.0	33.0	13.0	130.0
August	49.0	23.0	23.0	33.0	49.0	23.0	49.0	23.0	23.0	11.0	6.8	23.0	49.0	13.0	13.0	49.0	14.0	17.0	23.0	49.0	14.0	11.0	2.0	13.0
July	350.0	920.0	350.0	31.0	64.0	49.0	920.0	31.0	79.0	95.0	70.0	32.0	33.0	130.0	49.0	32.0	33.0	23.0	33.0	33.0	13.0	46.0	17.0	32.0
June	49.0	13.0	14.0	7.8	79.0	4.5	7.8	7.8	13.0	11.0	23.0	6.8	17.0	2.0	13.0	4.5	22.0	1.8	33.0	2.0	2.0	9.3	13.0	2.0
May	2.0	4.5	23.0	27.0	49.0	4.5	33.0	22.0	23.0	4.0	17.0	23.0	23.0	1.8	13.0	17.0	23.0	1.8	33.0	7.8	7.8	2.0	21.0	4.0
April	33.0	4.5	170.0	49.0	23.0	4.5	130.0	17.0	22.0	1.8	110.0	17.0	17.0	2.0	70.0	4.0	7.8	1.8	NS	11.0	2.0	1.8	7.8	23.0
March	33.0	33.0	23.0	49.0	11.0	23.0	49.0	31.0	17.0	2.0	17.0	11.0	13.0	4.5	17.0	4.5	2.0	2.0	17.0	22.0	2.0	2.0	17.0	4.5
February	79.0	23.0	540.0	49.0	70.0	31.0	350.0	49.0	79.0	17.0	240.0	11.0	23.0	22.0	240.0	22.0	7.8	2.0	33.0	7.8	6.8	11.0	33.0	11.0
January	17.0	49.0	33.0	49.0	17.0	22.0	33.0	23.0	13.0	33.0	13.0	4.5	23.0	7.8	33.0	4.5	17.0	7.8	7.8	7.8	7.8	7.8	4.5	2.0
** Truncated GeoMetric Mean	36.0	40.0	38.0	39.0	26.0	28.0	30.0	30.0	18.0	18.0	17.0	16.0	15.0	14.0	16.0	14.0	10.0	9.0	9.0	10.0	8.0	9.0	8.0	10.0
** Truncated 90th Percentile	139.0	192.0	211.0	187.0	69.0	91.0	152.0	163.0	58.0	72.0	77.0	79.0	39.0	54.0	71.0	74.0	35.0	41.0	44.0	47.0	33.0	32.0	26.0	38.0

NS = No Sample

SCDES Regulatory Requirements:

Geometric Mean ≤ 14

90th Percentile ≤ 43

\*\* Town staff calculations utilizing SCDES statistics

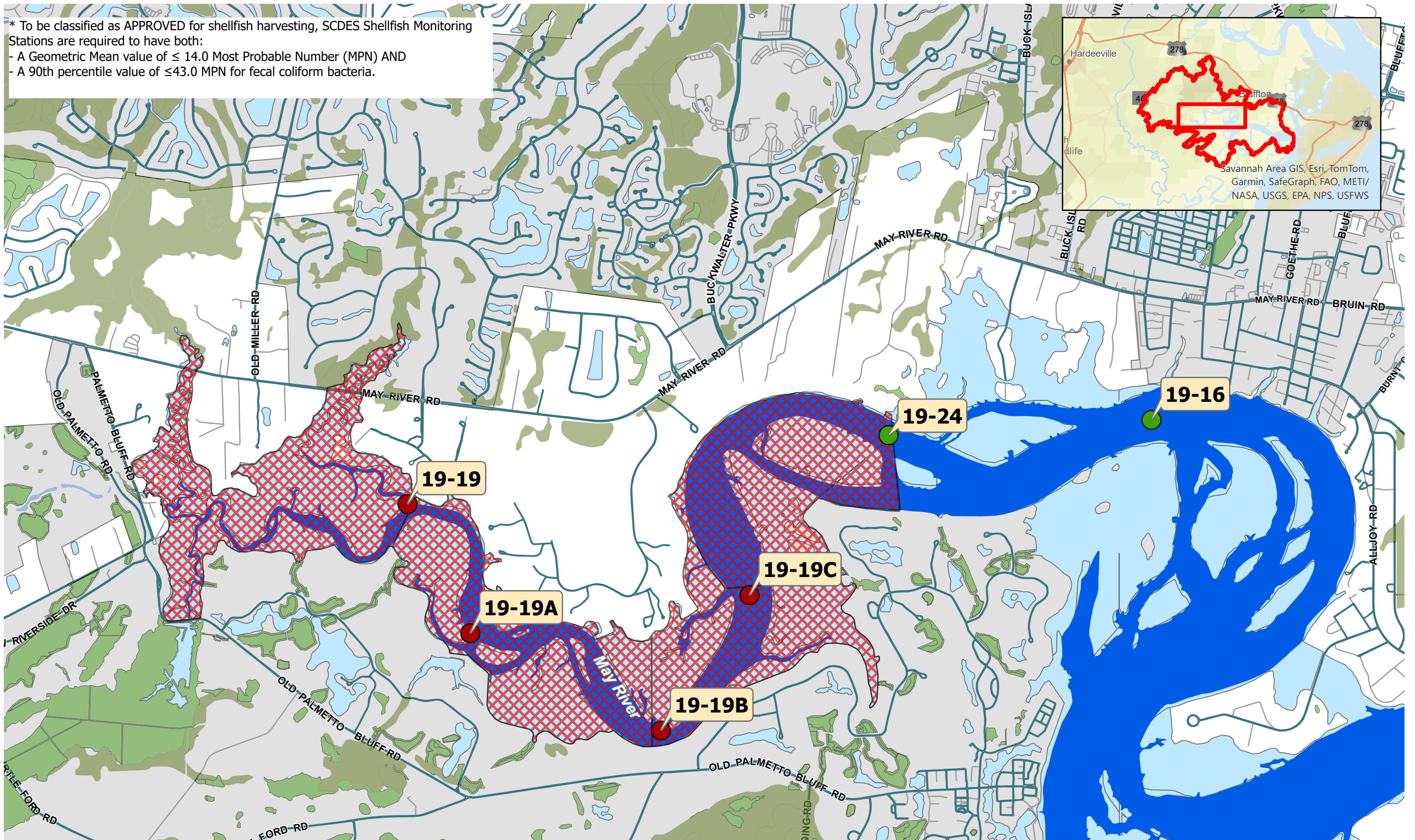
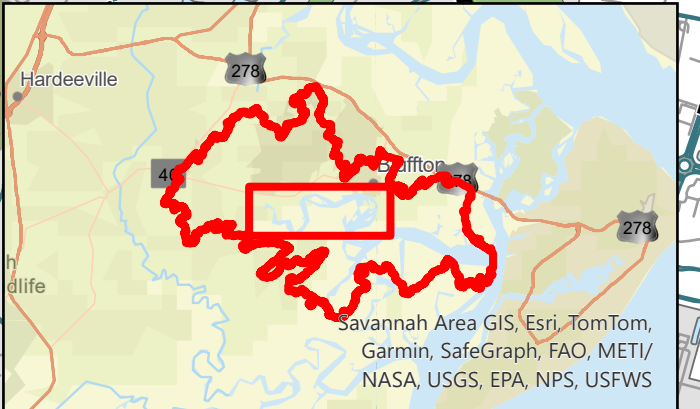
Note:

December 2024 ends the data collection period for 2025 shellfish harvesting season.

2024 fecal coliform data is part of the 2025 classification data collection period.

\* 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            | Water                               |
| Beaufort County Jurisdiction          | Wetlands                            |
| Restricted 2024/2025 Shellfish Season | Open Shellfish Monitoring Station   |
| Streets                               | Closed Shellfish Monitoring Station |

**Town of Bluffton**  
Beaufort County, SC  
**SCDES SHELLFISH  
HARVESTING STATUS**

0 0.17 0.35 0.7 Miles

Date: 7/22/2024 1:16 PM





## May River Watershed Action Plan Update & Modeling Report Implementation Summary

### **Background**

- *May River Watershed Action Plan Update & Modeling Report* (Action Plan Update & Modeling Report) was completed November 2020.
- Town Council adopted the Action Plan Update & Modeling Report 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 Action Plan Update & Modeling Report 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.

### **May River Watershed Action Plan Impervious Restoration Water Quality Projects**

- Initial site investigations including geotechnical investigations and reports are complete for 8 of the 11 participating project sites.
- Fee-in-Lieu Fund establishment/administration Policy Document has been completed. Comments from Finance have been incorporated into Final Draft. Master Fee Schedule updates have been drafted.
- Initial Property Owner contacts for 15 Additional Sites within municipal limits have been made and concept plan development is in process.
- **Next Steps**
  - Preliminary Design of each of the 8 original sites has been made, under review, and is being utilized for proposed FY26 Capital Improvement Projects (CIP).
  - Fee-in-Lieu discussion proposed for January Town Council Workshop.
  - Adoption of Fee-in-Lieu as part of FY26 Master Fee Schedule.

## **Septic to Sewer Project: Stoney Creek/Palmetto Bluff Sewer Partnership**

- 2022 updated cost-estimate for the project from BJWSA is \$7.2 million + contingencies.
- BJWSA is the Project Manager 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>.

## **May River Watershed Action Plan Water Quality Program Status**

- The Microbial Source Tracking (MST) Laboratory has completed the development of additional MST genetic markers for dogs, horses, deer, and birds in addition to humans. Preliminary implementation of these markers on a small number of historical South Carolina Department of Environmental Services (SCDES) May River samples.
- Staff have completed data (precipitation, bacteria, continuous flow, and intermittent flow) collection of the four (4) May River Headwaters subwatersheds. Town of Bluffton is in procurement process for calibration of the Town's WQ Model in the May River Headwaters.
- Water Environmental Consultants (WEC) has deployed a water elevation gauge on the Palmetto Bluff Bridge for the Duck Pond subwatershed.
- WEC has provided a final report for the May River Headwaters (Stoney Creek, Rose Dhu Creek, and Palmetto Bluff subwatersheds). Staff submitted comments to WEC.
- **Next Steps**
  - Expand new MST markers in strategic water quality monitoring locations.
  - WEC Duck Pond water elevation data collection until January 2025. WEC final report following data collection.
  - WEC provides revised flow monitoring final reports for May River Headwaters to staff.
  - Review proposal for calibration of Town's WQ Model in the May River Headwaters.



## **May River Watershed Action Plan Advisory Committee Meeting**

**Thursday, December 05, 2024 at 3:00 PM**

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

### **AGENDA**

#### **I. CALL TO ORDER**

#### **II. ROLL CALL**

#### **III. ADOPTION OF MINUTES**

1. Adoption of July 25th, 2024 Minutes
2. Adoption of August 22nd, 2024 Minutes

#### **IV. PUBLIC COMMENT**

#### **V. NEW BUSINESS**

1. Introduction of New Stormwater Inspector - Andrea Moreno, MS4 Program Manager
2. Adoption of the 2025 Meeting Dates and Times - Beth Lewis, Water Quality Program Manager
3. Presentation of Proposed Updates to the Southern Lowcountry Stormwater Design Manual - Andrea Moreno, MS4 Program Manager
4. Presentation on Proposed Work to Develop Town Wetland and Resiliency Protections - Beth Lewis, Water Quality Program Manager
5. Progress Report on the May River Watershed Baseline Assessment - Beth Lewis, Water Quality Program Manager

#### **VI. ADJOURNMENT**

**NEXT MEETING DATE: Proposed January 23, 2025**

*“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.*

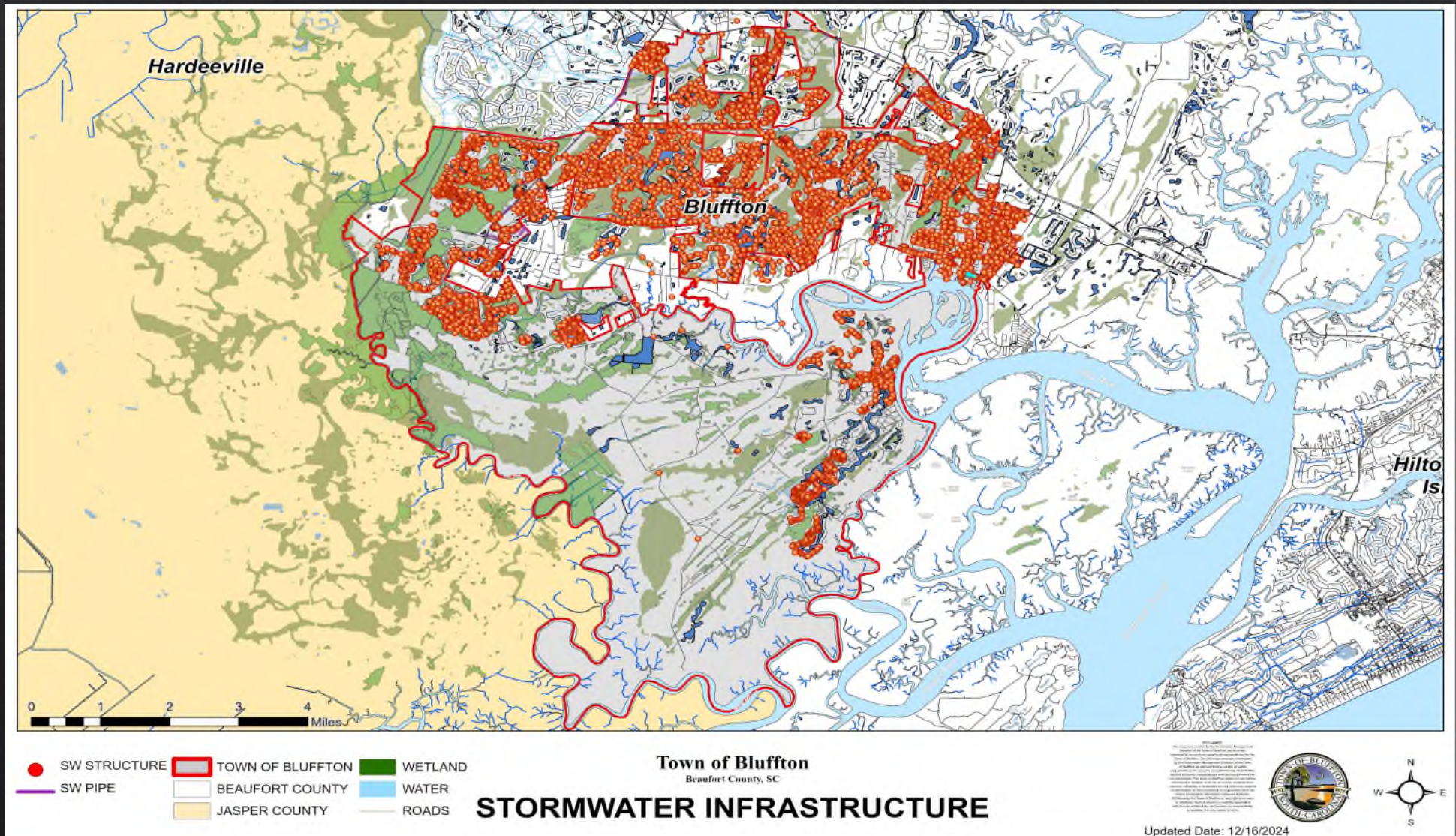
*\*Please note that each member of the public may speak at one public comment session and a form must be filled out and given to the Town Clerk. To submit a public comment online, please click here:*

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

*Public comment is limited to 3 minutes per speaker.*



# MS4 Minimum Control Measure #3 – IDDE (Illicit Discharge Detection & Elimination): Stormwater Infrastructure Inventory



## Stormwater Infrastructure Inventory Collection Status

Collection Totals

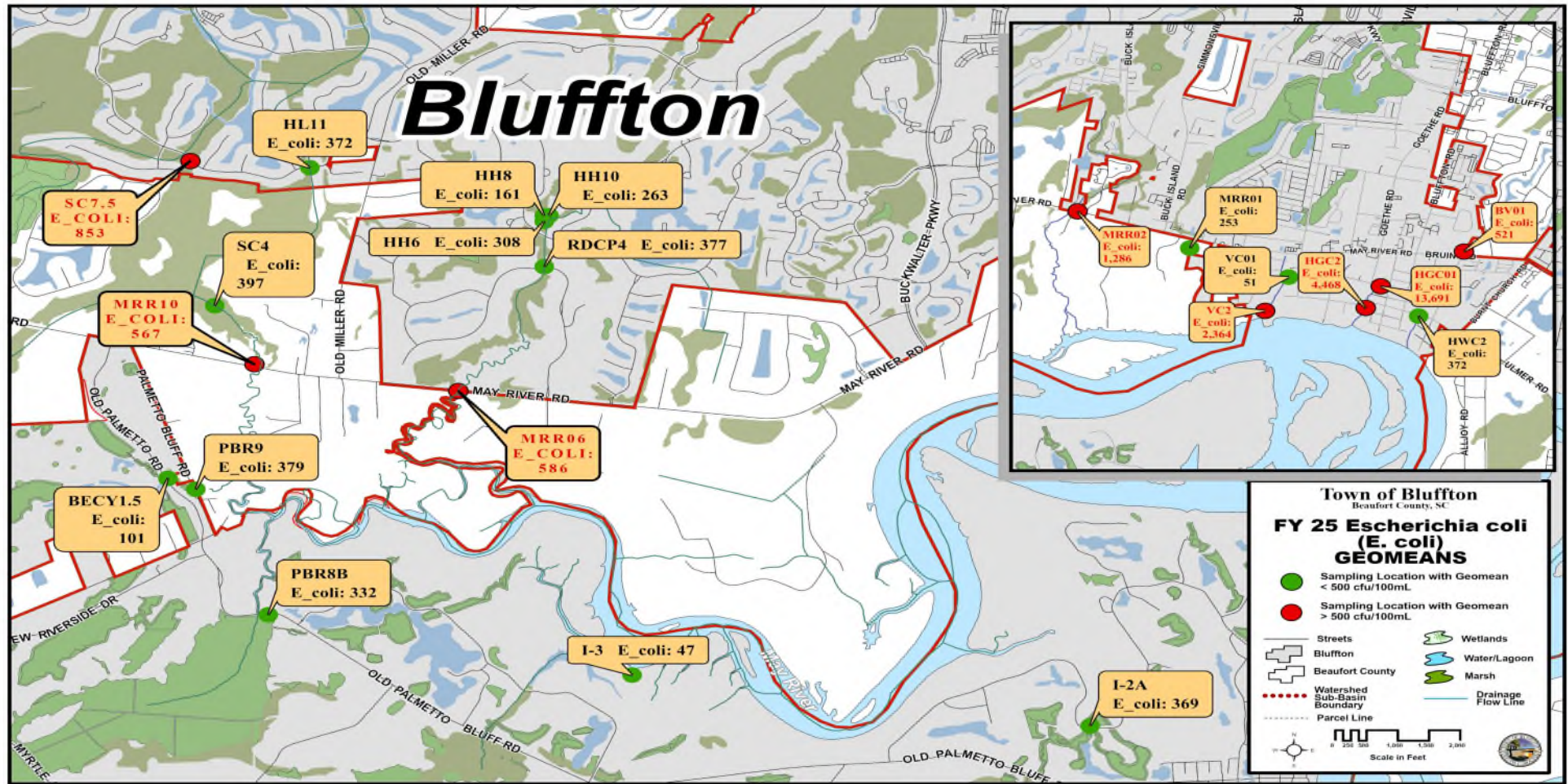
17,848

FY 2025 YTD

614



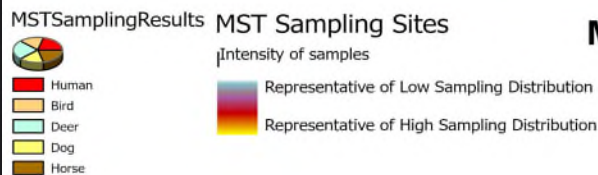
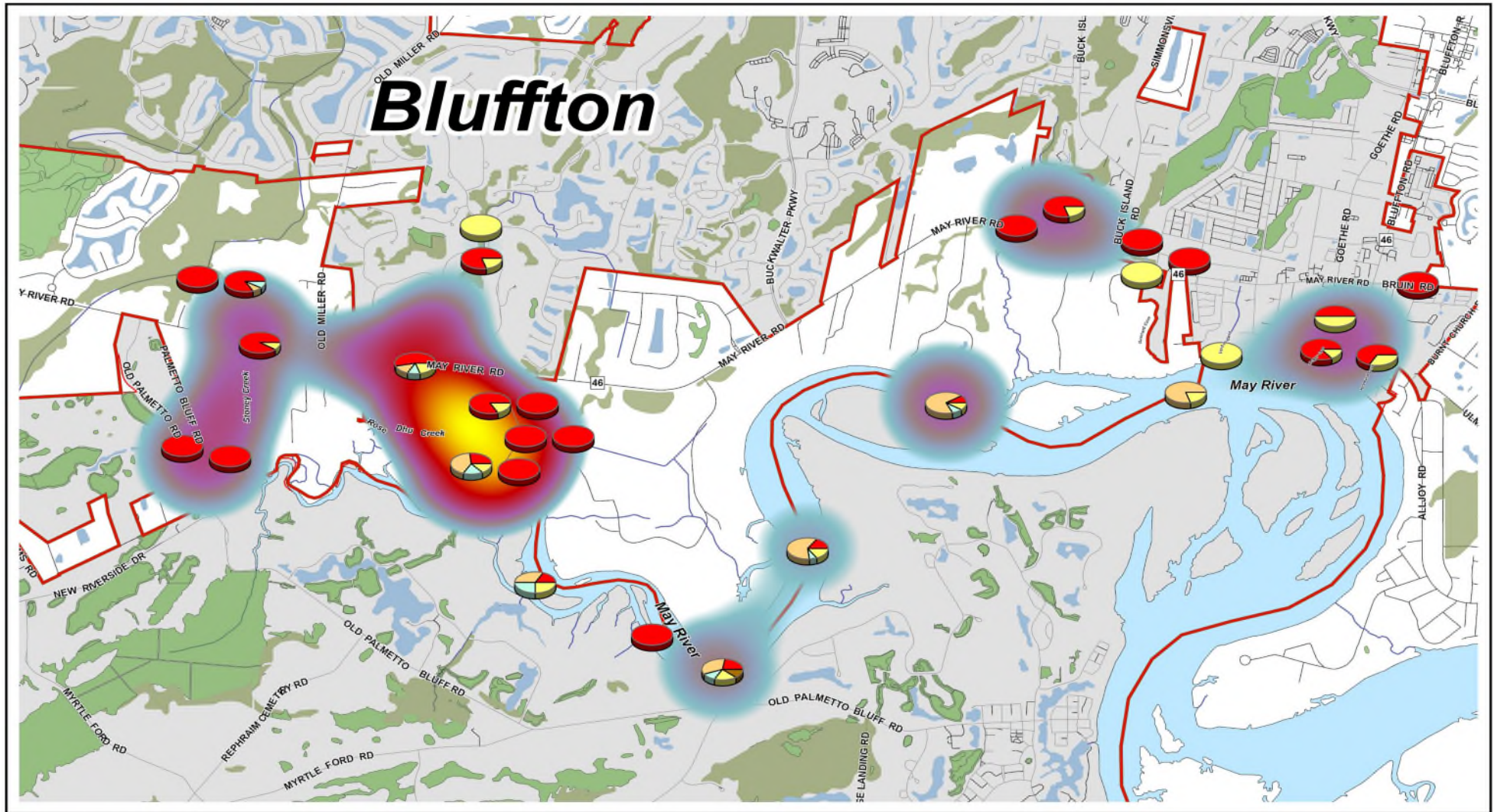
# MS4 Minimum Control Measure #3 – IDDE: *E. coli* Concentrations Trend Map



	USCB Water Quality Samples	Microbial Source Tracking Samples	MS4 Quarterly Samples Collected
FY 2025 YTD Totals	265	52	77
FY 2024 Totals	620	62	209
FY 2023 Totals	584	108	108



# MS4 Minimum Control Measure #3 – IDDE: Microbial Source Tracking (MST) Trend Map



## MICROBIAL SOURCE TRACKING (MST) LOCATIONS

Samples at Sites With Positive Detection and the Intensity of Positive Hits

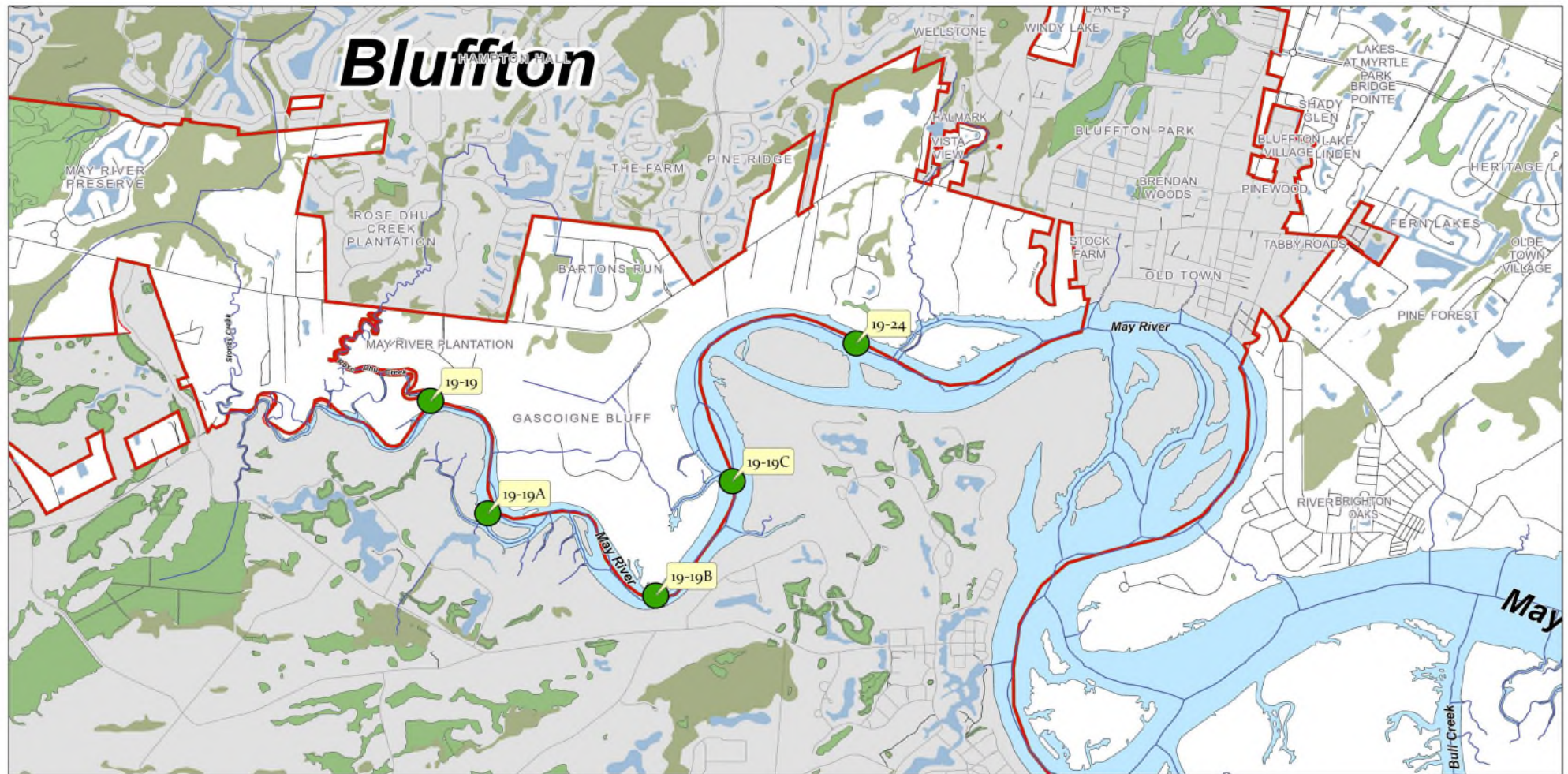
Town of Bluffton  
Beaufort County, SC



Updated Date: 12/



# MS4 Minimum Control Measure #3 – IDDE: Microbial Source Tracking (MST) Map – Human Sources

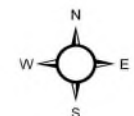


- MST Sampling Location Without Human Genetic Marker Detection
- MST Sampling Location With Human Genetic Marker Detection
- Flowline
- Street
- Town Jurisdiction
- County Jurisdiction

## MICROBIAL SOURCE TRACKING LOCATIONS SCDES Sampling Results From November 12, 2024

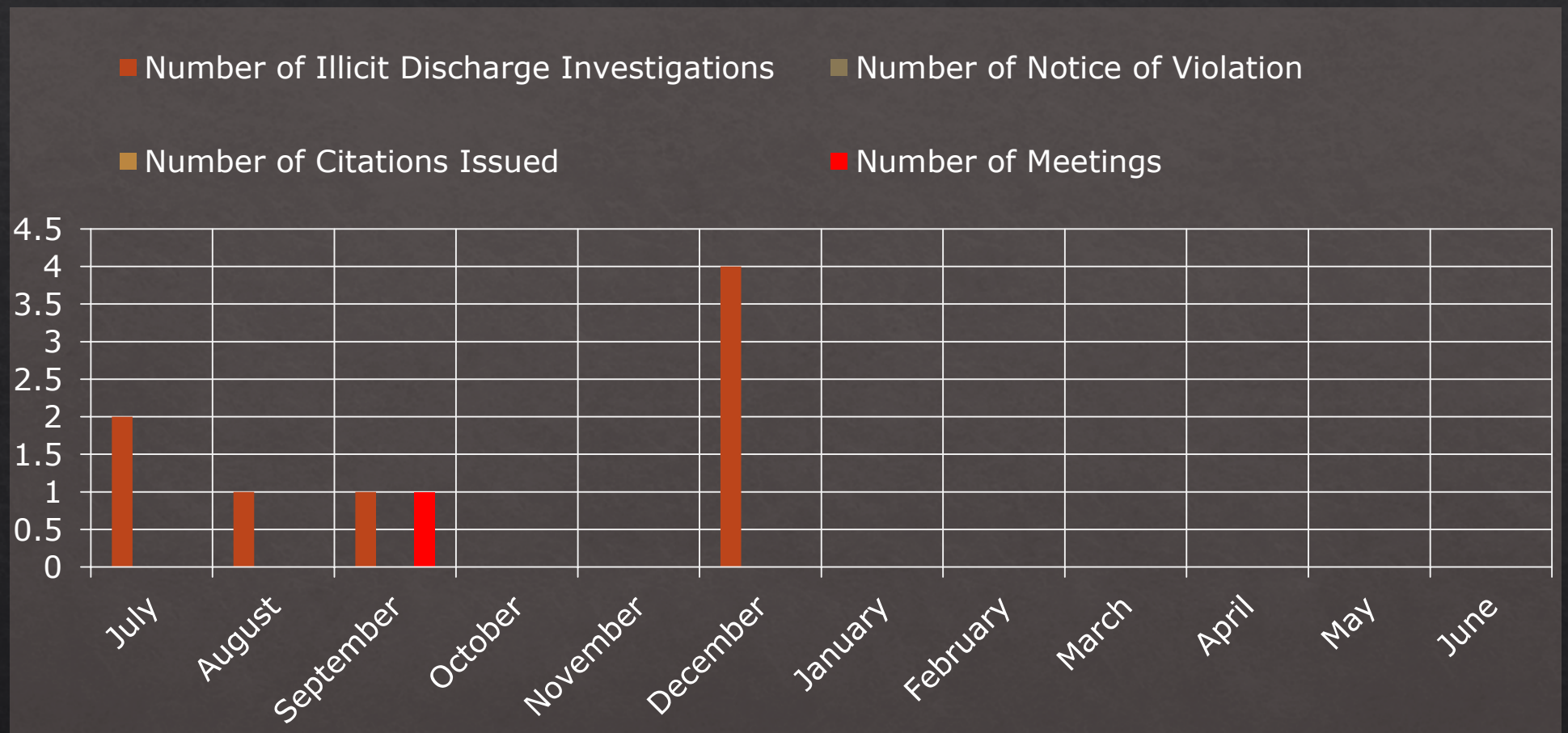
\* December SCDES sampling cancelled due to SCDES staff availability\*

**Town of Bluffton**  
Beaufort County, SC



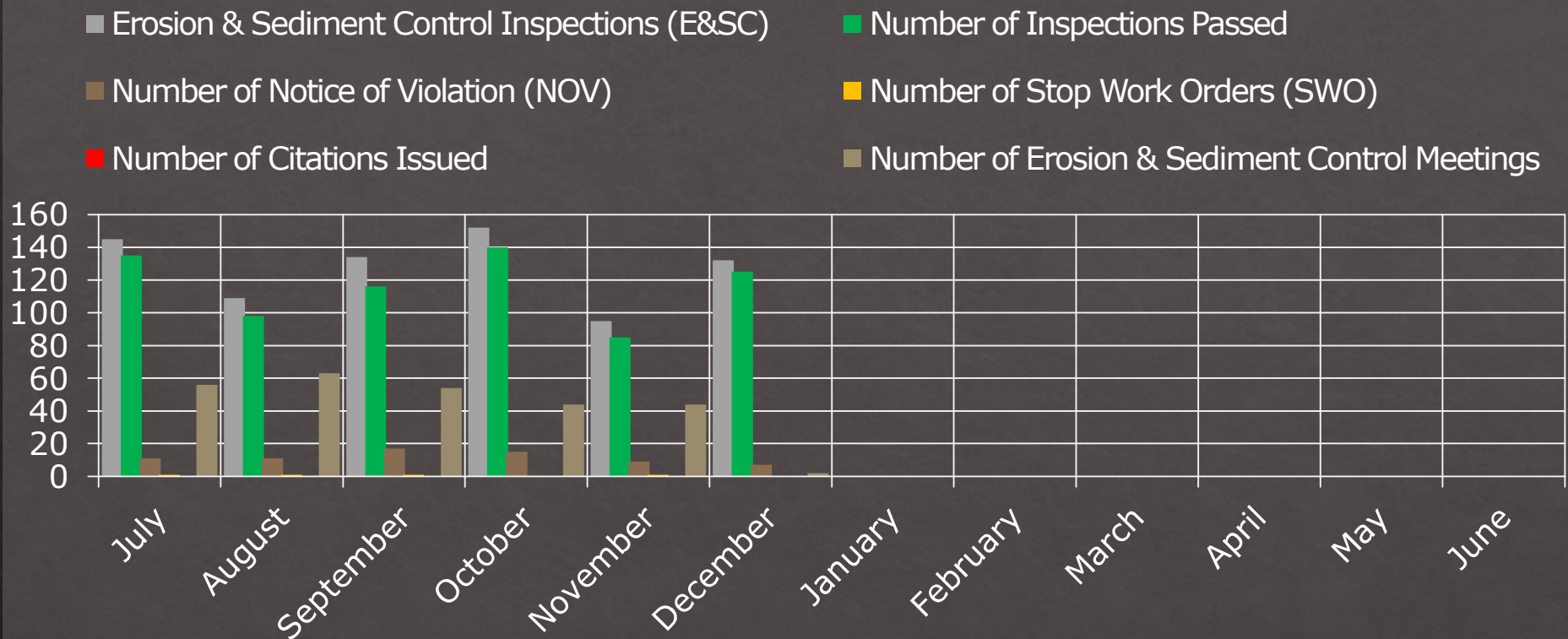


# MS4 Minimum Control Measure #3 – IDDE: Illicit Discharge Investigations



	Number of Illicit Discharge Investigations	Number of Notices of Violation Issued	Number of Citations Issued	Number of Meetings
FY 2025 YTD Totals	8	0	0	1
FY 2024 Totals	33	15	15	35
FY 2023 Totals	27	8	1	20

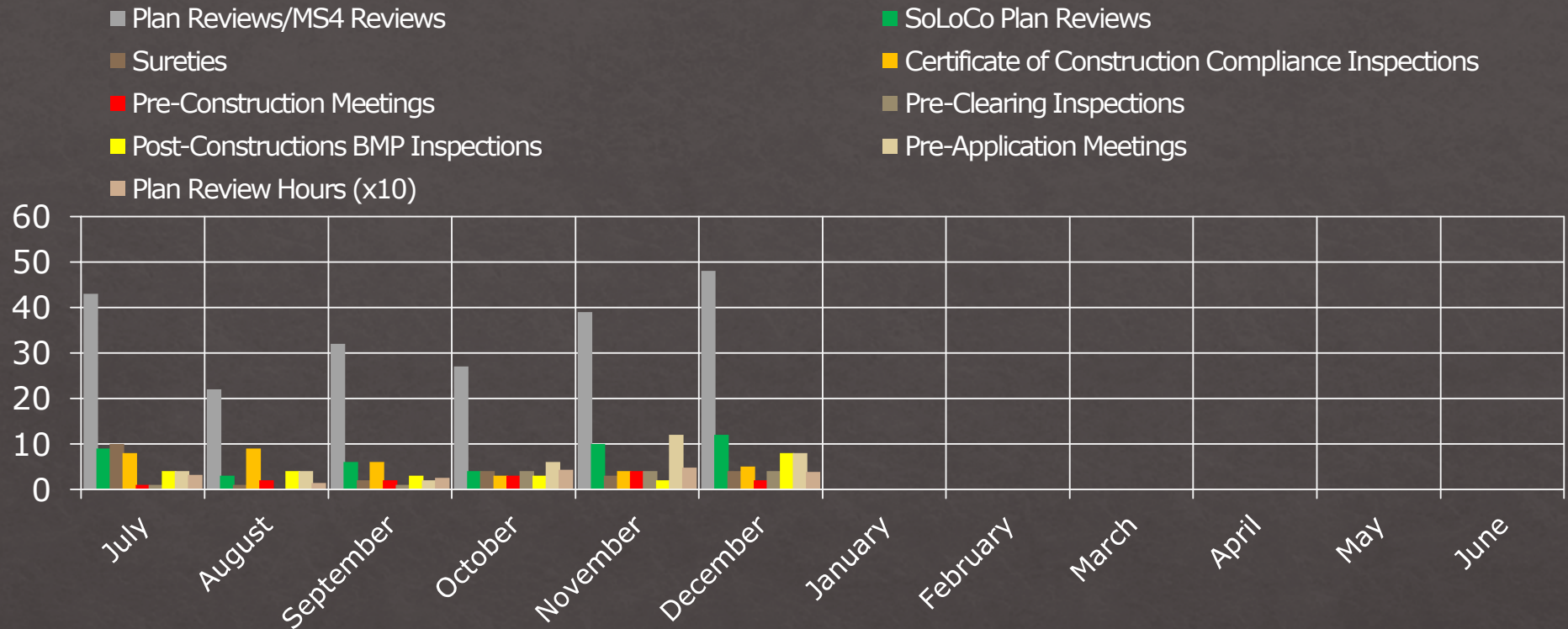
## MS4 Minimum Control Measure #4 - Construction Site Stormwater Runoff Control



	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 2025 YTD Totals	767	699	70	4	0	263
FY 2024 Totals	1,875	1,767	103	10	0	526
FY 2023 Totals	2,321	2,030	266	26	0	577



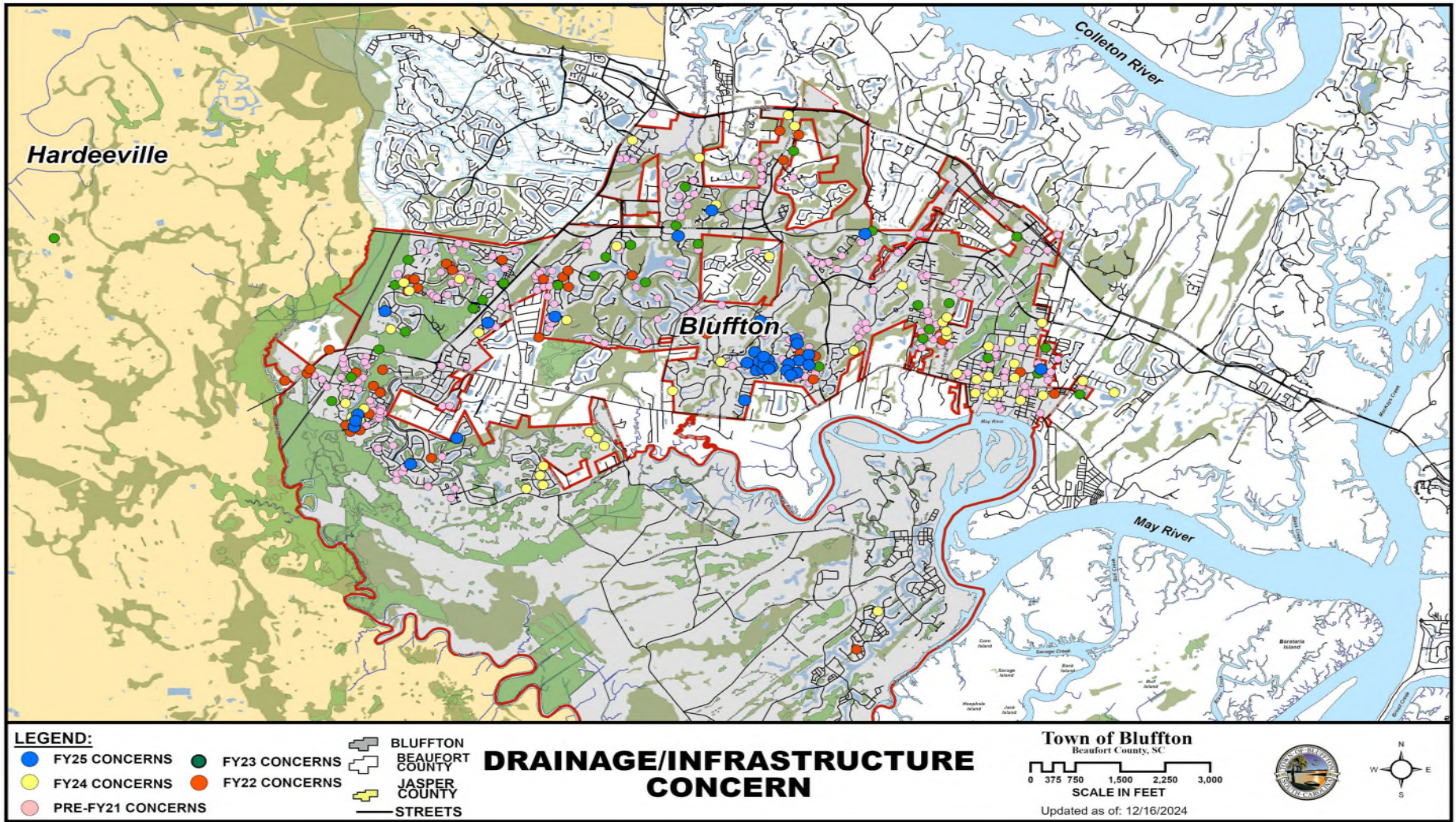
## MS4 Minimum Control Measure #5 Stormwater Plan Review & Related Activity



	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 2025 YTD	211	44	24	35	14	14	24	36	199 Hrs.
FY 2024 Totals	330	63	27	69	37	28	48	47	283 Hrs.
FY 2023 Totals	297	67	42	40	15	13	45	50	386 Hrs.



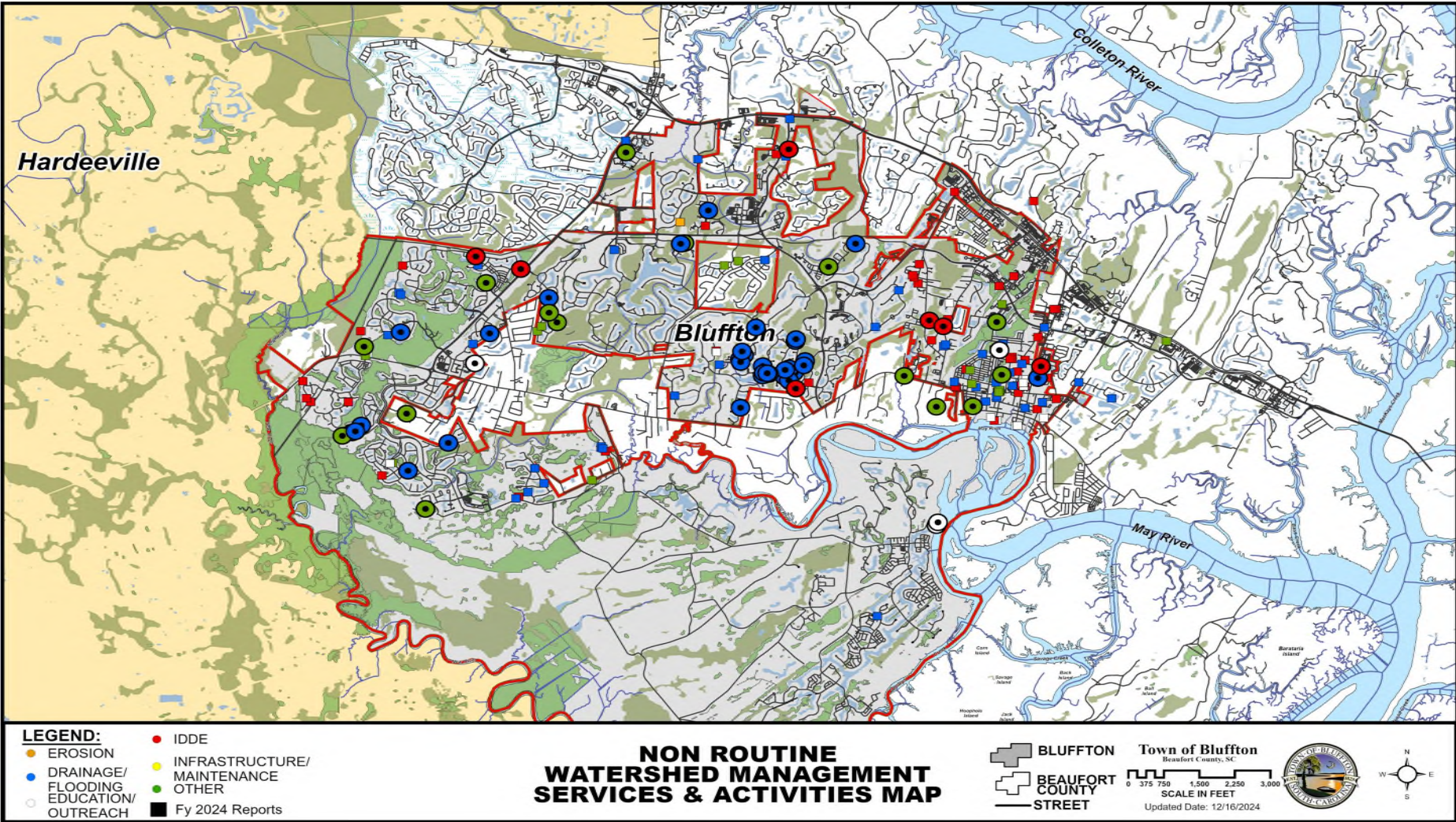
# Citizen Drainage, Maintenance and Inspections Concerns Map



	Number of Drainage Concerns Investigated	Number of Meetings
FY 2025 YTD Totals	8	0
FY 2024 Totals	47	13
FY 2023 Totals	61	52

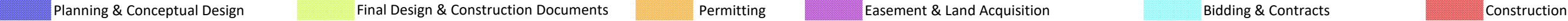


# Citizen Request for Watershed Mngt. Services & Activities Map



	Number of Citizen Requests Investigated	Number of Meetings
FY 2025 YTD Totals	41	7
FY 2024 Totals	137	40
FY 2023 Totals	46	23

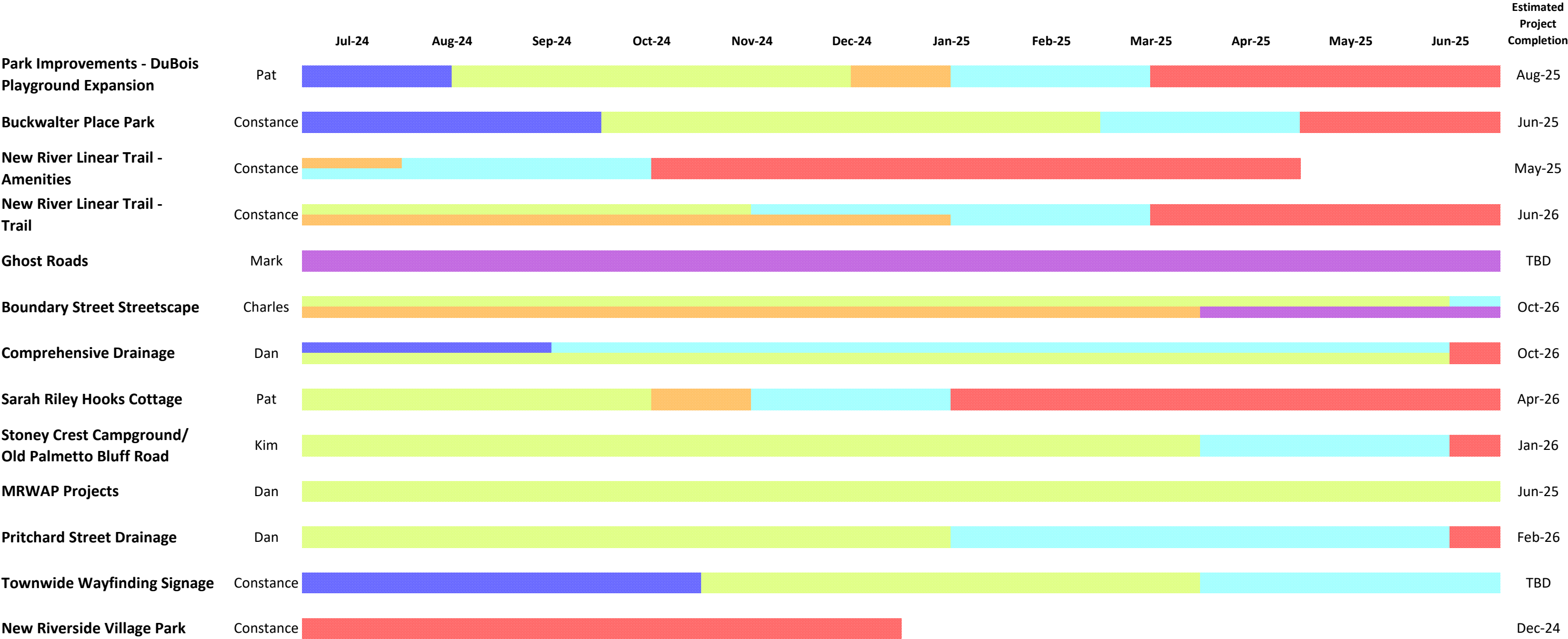
FY25  
CIP Master Project Schedule



\*SUBJECT TO CHANGE\*



FY25  
CIP Master Project Schedule



## TOWN COUNCIL

### STAFF REPORT

#### Public Services Department



<b>MEETING DATE:</b>	January 14, 2025
<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, and general repairs of the Garvin House and Sarah Riley.

**3. PARKS**

- **Ongoing Park Facilities and Landscape Maintenance** of Dubois Park, Martin Family Park, Oscar Frasier, Field of Dreams, Buckwalter Place Park, Oyster Factory Park, Pritchard Pocket Park, May River Pocket Park, Wright Family Park, Eagles Fields, New Riverside Barn, New River Trail, and the newly acquired Evercore Park.

**4. ADDITIONAL ACTIVITIES**

- Received and installed Christmas tree at Martin Family Park
- Decorated Christmas Tree
- Heavy focus on Christmas decorations throughout the Town
- Received new chairs & storage carts for RCC
- Overlayed floor in RCC table storage room
- Rebuilt bridge BPP trail
- Winterized Splash Pad
- Built storage shelves in shipping containers for Christmas decorations
- Power washed exterior of RCC
- Stained deck at RCC
- Installed brass plaque on donated bench
- Rebuilt kitchen door at RCC and rehung
- All Public Services vehicles received new Public Services Town Graphics
- Fabricated steel hooks for conex box to store Christmas wreaths
- Rebuilt oyster table for Oyster Factory Park
- Replaced toilet in Oscar Frazier restroom

**5. PREPPING FOR SPECIAL AND CIVIC EVENTS**

- Set-up & support for following events:
  - Tree Lighting
  - Christmas Parade
  - Returned all cones and ropes from parade to Storage container
  - Set up RCC for PD Holiday Party

**6. EQUIPMENT MAINTENANCE & REPAIR**

- Repaired Exmark Lawn mower deck & painted
- Repaired roof on Ford Ranger & primed & paint
- Installed directionals & roof light on Kubota



**1. BEAUTIFICATION PROGRAM**

- No meeting for this month

**2. ATTACHMENTS**

- **Public Services Monthly Cost Report** – Attachment 1

**Public Services Monthly Cost Reports - December 2024***(Cost Includes Labor and Equipment)*

ASSETS AND EVENTS	COST
FACILITIES	\$3,964.22
PARKS	\$6,258.80
ROADS AND TRAILS	\$4,267.24
SPECIAL EVENTS	\$7,827.78



---

## **Director's Report – DRCI**

**January 2024**

### **Entrepreneur Program Update**

#### ***Overview***

At present, the DRCI is experiencing the highest success in its 12-year history as evidenced by a record 22 companies that were enrolled in either the STARTUP or GROWTH Program in 2023. In the past three months a number of them have completed their Program.

As we embark on the new year, we are witnessing a robust pipeline of prospective companies. Our team is conducting due diligence to facilitate the integration of these entities into our STARTUP and GROWTH Programs.

Our experience shows that entrepreneurial activity in this region exhibits a cyclical pattern, with a notable uptick in interest in initiating new ventures during the late winter and early spring periods.

A particularly gratifying development has been the substantial influx of GROWTH Companies approaching the DRCI through referrals. It is noteworthy that almost all the GROWTH companies we have engaged with, or are currently assisting, are based in Bluffton.

This is in part a reflection of the area's expanding population, which has, in turn, catalyzed the growth of these established enterprises. Consequently, these companies are encountering significant expansion and are increasingly seeking external expertise in strategic planning, management, and staffing, among other areas. This external support is vital in equipping them with the tools necessary for optimizing their operations and fostering even further growth in the future.

As of this report the following Program Companies are:

- STARTUP companies
  1. Hardee Greens
  2. ChangePoint
  3. Petitek
  4. ESA

- GROWTH
  1. Beachside Tire
  2. Bluffton Electric
  3. LaSource

#### *Key efforts in January*

- Multiple screening calls with leads that are interested in learning about our Programs
- STARTUP Pitch for Pro Series Golf Irons. Expected to start the STARTUP Program in February
- Kickoff Meeting with new GROWTH customer, LaSource
- Initial phone call with Patrick Lee. Set Ideation meeting for beginning of February
- Set mentor Team for Delta Roofing for the GROWTH Program. They will begin in February
- Growth Diligence Meeting with Barbers of the Lowcountry - rejoining Growth Program in February
- Diligence meeting with Richard Inglis - Daufuskie Ferry Boat
- Ideation session for Sonya Haramis set for beginning of February
- Custom Audio Visual is on pause until March
- OPFOB will be back in February

## **Economic Development Update**

### ***Overview***

Following the enactment of the Economic Development Ordinance, the DRCI is increasingly engaged in more traditional economic development activities. Our current primary focus encompasses two critical elements:

1. The implementation of a comprehensive marketing strategy aimed at enhancing awareness of the EDO program. A meticulously crafted marketing plan has been developed, encompassing a range of activities designed to generate leads and facilitate communication. This plan includes targeted messaging, digital media initiatives, social media engagement, and other strategies to effectively disseminate information and streamline the application process for potential participants. While SCAD was going to assist with this development, due to certain constraints DRCI and TOB Staff will now be in charge of developing the marketing assets and executing the plan.

2. The ongoing development of the Buckwalter Place Project, situated in proximity to the LEC, is another key undertaking. DRCI is slated to occupy a portion of Building A, and various aspects of this project are now entering a phase requiring detailed review and oversight.

In addition to these projects, we maintain regular interactions with Assistant Town Manager Chris Forster and the BCEDC. These meetings are instrumental in ensuring that all parties are consistently informed about emerging opportunities and collaborative endeavors that may benefit any or all of the involved organizations. Our goal is to foster a synergistic approach to economic development, leveraging the strengths and resources of each entity to maximize impact and efficiency.

#### *Key efforts in January*

- A deeper dive into EDIP marketing plan; begin creation of key assets
- Multiple zoom calls with Chris Forster and Andre Frattino from SCAD regarding EDIP marketing program
- Placer.ai demo
- Meeting with Rick Maggin of the Lowcountry Pickleball Club and John O'Toole from BCEDC
- First review of architectural renderings for Buckwalter Place development – Building A
- Attended and exhibited at CONVERGE hosted by BCEDC

### Operations and Marketing

- Awarded SC Dept of Commerce StimulateSC Grant application
- Pre-Start course curriculum is complete. Class Starts in March
- Working on Artificial Intelligence best practices and implementation course
- Continued work on setting KPI's for new strategic initiatives
- Hosted the Professional Women's Network of the Lowcountry at The HUB
- Working on initial budget planning
- Toured Beaufort Landing Pad
- Attended the Town of Bluffton Night of Unity Event

### Mentor Program

- 69 Mentors
- Meeting with Lead mentor Jim Biggs
- Planning Mentor Mingle for end of February

## **Partnerships**

### **Hardeeville**

- Monthly meeting with Mayor Williams, Michael Czymbor and Neil Parsons
- Rebranding and website complete. Launching in February
- The first Business event in a series is planned for February
- Working on AI Educational Series
- Working with City of Hardeeville on social media sites DRCI/HDV

### **BlacQuity**

- Next cohort starts in March

### **Beaufort County Economic Development Corporation**

- Working with them on multiple projects
- Attended and had a booth at BCEDC's Converge Summit

### **Greater Bluffton Chamber**

- Hosted GBCC Lunch and Learn at The HUB
- Attended Coffee & Connections

### **Hilton Head – Bluffton Chamber**

- Working with Chamber on content for AI presentation next month
- HHI Chamber Power Hour

## **Entrepreneurial Thought of the Month**



“When everything  
seems to be going  
against you, remember  
that the airplane takes  
off against the wind,  
not with it.”

- *Henry Ford*



# GROWTH MANAGEMENT UPDATE

January 14, 2025

## 1. Town Council Appointed Boards/Commissions/Committees/Citizen Group Meetings:

- a. **Planning Commission:** December 18, 2024, meeting agenda attached. Next meeting scheduled for Wednesday, January 22, 2025.
- b. **Historic Preservation Commission:** December 4, 2024, meeting agenda attached. Next meeting scheduled for Wednesday, January 8, 2025.
- c. **Board of Zoning Appeals:** December 3, 2024, cancellation notice attached. Next meeting scheduled for Tuesday, January 7, 2025.
- d. **Development Review Committee:** December 4 & 18, 2024, meeting agendas attached. December 11 & 26, 2024 cancellation notices attached. Next meeting scheduled for Wednesday, January 8, 2025.
- e. **Historic Preservation Review Committee:** December 16, 2024, meeting agenda attached. December 2, 9, 23 & 30, 2024, cancellation notices attached. Next meeting scheduled for Monday, January 6, 2025.
- f. **Construction Board of Adjustment and Appeals:** December 17, 2024, cancellation notice attached. Next meeting scheduled for Tuesday, January 21, 2025.
- g. **Affordable Housing Committee:** December 5, 2024, meeting agenda attached. Next meeting scheduled for Thursday, January 9, 2025.

## 2. Community Development / Affordable Housing Committee Work Program:

### Neighborhood Assistance Program.

The budget for the Neighborhood Assistance Program for FY 2025 has been approved at \$400,000 by Town Council. An additional \$144,000 was added to the budget by a grant awarded to the program by Beaufort Jasper Housing Trust on August 22. That brings the 2025 fiscal year budget to \$544,000.

Nineteen homes have received home repairs at a total of \$138,946.53.

Six homes have been serviced for septic pump outs or plumbing services at a total of \$3,224.

One home has been serviced for tree service at a total of \$200.00

One home is currently being serviced for repairs. Town Building Safety and I inspected three homes this week for repairs and estimates have been requested.

**ATTACHMENTS:**

1. Planning Commission meeting agenda for December 18, 2024.
2. Historic Preservation Commission meeting agenda for December 4, 2024.
3. Board of Zoning Appeals cancellation notice for December 3, 2024.
4. Development Review Committee meeting agendas for December 4 & 18, 2024 and cancellation notices for December 11 & 26, 2024.
5. Historic Preservation Review Committee meeting agenda for December 16, 2024, and cancellation notices for December 2, 9, 23 & 30, 2024.
6. Construction Board of Adjustments and Appeals cancellation notice for December 17, 2024.
7. Affordable Housing Committee meeting agenda for December 5, 2024.
8. Building Permits and Planning Applications:
  - a. Building Permits Issued FY 2018-2025 (to December 18, 2024).
  - b. Building Permits Issued Per Month FY 2018-2025 (to December 18, 2024).
  - c. Value of Construction FY 2018-2025 (December 18, 2024).
  - d. New Single Family Residential Building Permits Issued Per Month FY 2018-2025 (to December 18, 2024).
  - e. New Single Family Residential Building Permits Issued by Neighborhood FY 2018-2025 (to December 18, 2024).
  - f. New Single-Family Certificates of Occupancy Issued by Neighborhood FY 2018-2025 (to December 18, 2024).
  - g. New Commercial Construction/Additions Heated Square Footage FY 2018-2025 (to December 18, 2024).
  - h. Planning and Community Development Applications Approved FY 2018-2025 (to December 18, 2024).
  - i. Multi Family Apartments Value FY 2018-2025 (to December 18, 2024).
  - j. Multi Family Apartments Square Footage FY 2018-2025 (to December 18, 2024).
  - k. Multi Family Apartments Total Units FY 2018-2025 (to December 18, 2024).
9. Planning Active Application Report



## Planning Commission Meeting

Wednesday, December 18, 2024 at 6:00 PM

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

### AGENDA

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

#### I. CALL TO ORDER

#### II. ROLL CALL

#### III. NOTICE REGARDING ADJOURNMENT

The Planning Commission will not hear new items after 9:30 p.m. unless authorized by a majority vote of the Commission Members present. Items which have not been heard before 9:30 p.m. may be continued to the next regular meeting or a special meeting date as determined by the Commission Members.

#### IV. ADOPTION OF MINUTES

1. November 20, 2024 Minutes

#### V. PUBLIC COMMENT

#### VI. OLD BUSINESS

#### VII. NEW BUSINESS

1. **Pickup USA Fitness Club (Development Plan Application):** A request by Brad Buss of Ward Edwards Inc., on behalf of Eric Zwilsky of 1 Corinthians, LLC, for approval of a Preliminary Development Plan. The project consists of a 15,400 SF basketball-focused fitness facility with associated access, parking, utilities and stormwater infrastructure. The property is zoned General Mixed Use (GMU) and consists of approximately 6.0 acres identified by tax map numbers R610 031 000 0212 0000 and R610 031 000 0173 0000. (DP-10-24-019391) (Staff - Dan Frazier)

#### VIII. DISCUSSION

#### IX. ADJOURNMENT

**NEXT MEETING DATE: Wednesday, January 22, 2025**

*“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.*





## Historic Preservation Commission Meeting

Wednesday, December 04, 2024 at 6:00 PM

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

### AGENDA

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

#### I. CALL TO ORDER

#### II. ROLL CALL

#### III. NOTICE REGARDING ADJOURNMENT

The 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. November 6, 2024 Minutes

#### V. PUBLIC COMMENT

#### VI. OLD BUSINESS

#### VII. NEW BUSINESS

1. **Certificate of Appropriateness:** A request by Court Atkins Group, on behalf of April Perez, for a review of a Certificate of Appropriateness - HD to construct a new 2.5-story live/work building of approximately 3,180 SF with business and production facility on the first floor and a 1.5-story residential unit above, and a 2-story carriage house of approximately 1,060 SF, to be located at 1 Blue Crab Street, Lot 27, in the Tabby Roads Development, in the Old Town Bluffton Historic district and zoned Neighborhood General - HD. (COFA-11-23-018694)(Staff-Charlotte Moore)
2. **Certificate of Appropriateness:** A request by Court Atkins Architects, Inc., on behalf of 5812 Guilford Place, LLC, for approval of a Certificate of Appropriateness-HD to construct a new 2-story main building of approximately 2,400 square feet and a connected 2-story carriage house of approximately 1,050 square feet at 5812 Guilford Place, Lot 12, in the Stock Farm Development and with Old Town Bluffton Historic District. The property is zoned Neighborhood General-HD.(COFA-09-24-019336)(Staff-Charlotte Moore)

**VIII. DISCUSSION**

1. Historic District Monthly Update. (Staff)

**IX. ADJOURNMENT**

**NEXT MEETING DATE: Wednesday, January 8, 2025**

*“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 Board of Zoning Appeals (BZA)  
Meeting scheduled for

Tuesday, December 3, 2024, at 6:00 p.m.

Has been CANCELED  
due to a lack of agenda items.

The next meeting is scheduled for Tuesday,  
January 7, 2025.

If you have questions, please contact  
Growth Management at: 843-706-4500



## Development Review Committee Meeting

Wednesday, December 04, 2024 at 1:00 PM

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

### AGENDA

All Applications can be viewed on the Town of Bluffton's Permit Finder page  
<https://www.townofbluffton.us/permit/>

#### I. CALL TO ORDER

#### II. ROLL CALL

#### III. PUBLIC COMMENT

#### IV. OLD BUSINESS

#### V. NEW BUSINESS

1. **36 Buck Island Rd/CP-19 Upgrades (Public Project Amendment):** A request by Kirby Dobberfuhl of Black & Veatch Corporation on behalf of the property owner, BJWSA for approval of a Public Project. The amendment proposes the revision of the temporary bypass pump location and access road route. The property is zoned General Mixed Use and consists of approximately 11.4 acres identified by tax map number R610 031 000 0099 0000 located at 36 Buck Island Road. (DP-08-22-017101) (Staff - Dan Frazier)
2. **400 Buckwalter Place ASC (Development Plan Amendment):** A request by Ryan Lee of Novant Health, on behalf of Blake McRae of Core Buckwalter, LLC for approval of a Development Plan Amendment. The project consists of the renovation of an existing healthcare building to support ambulatory servicing center and office. The property is zoned Buckwalter PUD and consists of approximately 4.77 acres identified by tax map number R610 030 000 1849 0000 and located on the corner of Buckwalter Place Boulevard and Innovation Drive within the Buckwalter Place Master Plan. (DPA-10-24-019420) (Staff - Dan Frazier)
3. **New Riverside PUD Density Conversion:** A request by Lauren Niemiec of McLester & Niemiec on behalf of MFH Land, LLC for a by-right conversion of Seven and 29/100 (7.29) acres of commercial density into Twenty-Nine (29) residential dwelling unit rights requiring a Minor Amendment to the Jones Estate Development Agreement and New Riverside Concept Plan to adjust the total development rights allowed to reflect the conversion. (CPA-11-24-019441 / DAA-11-24-019441) (Staff - Brie Giroux)

#### VI. DISCUSSION

**VII. ADJOURNMENT****NEXT MEETING DATE: Wednesday, December 11, 2024**

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

*In accordance with the requirements of Title II of the Americans with Disabilities Act of 1990 ("ADA"), the Town of Bluffton will not discriminate against qualified individuals with disabilities on the basis of disability in its services, programs, or activities. The Town of Bluffton Council Chambers are ADA compatible. Auditory accommodations are available. Any person requiring further accommodation should contact the Town of Bluffton ADA Coordinator at 843.706.4500 or [adacoordinator@townofbluffton.com](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 DEVELOPMENT REVIEW COMMITTEE (DRC)

Meeting scheduled for

Wednesday, December 11, 2024 at 1:00  
P.M.

has been CANCELED  
due to a lack of agenda items.

The next meeting is scheduled for  
Wednesday, December 18, 2024.

If you have questions, please contact  
Growth Management at: 843-706-4500



## Development Review Committee Meeting

Wednesday, December 18, 2024 at 1:00 PM

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

### AGENDA

All Applications can be viewed on the Town of Bluffton's Permit Finder page  
<https://www.townofbluffton.us/permit/>

#### I. CALL TO ORDER

#### II. ROLL CALL

#### III. PUBLIC COMMENT

#### IV. OLD BUSINESS

#### V. NEW BUSINESS

1. **Bridge Street Streetscape Phases 2-3 (Public Project):** A request by Constance Clarkson on behalf of the Town of Bluffton for the approval of a Public Project application. The project consists of roadway, sidewalk, parking and drainage improvements in the Bridge Street right-of-way in Old Town Bluffton. (DP-11-24-019435) (Staff - Dan Frazier)
2. **Buckwalter Place Park Phases 2, 3, 4 (Public Project):** A request by Constance Clarkson on behalf of the Town of Bluffton for the approval of a Public Project application. The project consists of improvements of the Buckwalter Place Park to include amenity updates, paving, lighting, and landscaping. (DP-11-24-019429) (Staff - Dan Frazier)
3. **700 Buckwalter Towne Blvd (Development Plan):** A request by Cranston, LLC on behalf of TKC CCCLV, LLC for approval of a final development plan application. The project consists of a three-story, 54,000 square foot medical office building with associated parking and infrastructure. The property is identified by tax map number R610 030 000 1854 0000 and consists of 4.76 acres located at 700 Buckwalter Towne Boulevard in the Buckwalter PUD. (DP-03-24-019021) (Staff - Dan Frazier)
4. **Heritage at New Riverside - Phase 10 (Development Plan):** A request by Michael Hughes of Thomas & Hutton, on behalf of LSSD New Riverside, LLC, for approval of a final development plan application. The project consists of 40 single-family residential lots with associated infrastructure. The property is zoned New Riverside Planned Unit Development identified by tax map numbers R614 035 000 1362 0000 and R614 035 000 1318 0000 and consists of 11.3 acres within Heritage at New Riverside. (DP-01-23-017584) (Staff - Dan Frazier)

**VI. DISCUSSION****VII. ADJOURNMENT**

**NEXT MEETING DATE: Wednesday, January 8, 2025**

*“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 DEVELOPMENT REVIEW COMMITTEE (DRC)**

Meeting scheduled for

Thursday, December 26, 2024 at 1:00 P.M.

has been CANCELED  
due to a lack of agenda items.

The next meeting is scheduled for  
Wednesday, January 8, 2025.

If you have questions, please contact  
Growth Management at: 843-706-4500



# **PUBLIC NOTICE**

## THE HISTORIC PRESERVATION REVIEW COMMITTEE (HPRC)

Meeting scheduled for

Monday, December 2, 2024 at 4:00 P.M.

has been CANCELED  
due to lack of agenda items.

The next meeting is scheduled for  
Monday, December 9, 2024.

If you have questions, please contact  
Growth Management at: 843-706-4500





# **PUBLIC NOTICE**

## THE HISTORIC PRESERVATION REVIEW COMMITTEE (HPRC)

Meeting scheduled for

Monday, December 9, 2024 at 4:00 P.M.

has been CANCELED  
due to lack of agenda items.

The next meeting is scheduled for  
Monday, December 16, 2024.

If you have questions, please contact  
Growth Management at: 843-706-4500



## Historic Preservation Review Committee Meeting

Monday, December 16, 2024 at 4:00 PM

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

### AGENDA

#### I. CALL TO ORDER

#### II. ROLL CALL

#### III. PUBLIC COMMENT

#### IV. OLD BUSINESS

#### V. NEW BUSINESS

1. **17 Lawrence Street:** A request by Christopher Epps (Incircle Architecture), on behalf of owners, Jay and Lori Sofianek, for review of a Certificate of Appropriateness-HD to allow the construction of a 2-story Carriage House of approximately 1199 SF located at 17 Lawrence Street in the Old Town Bluffton Historic District and zoned Neighborhood General-HD. (COFA-11-24-019458) (Staff – Charlotte Moore)
2. **3 Blue Crab Street:** A request by Mike Vaccaro (Vaccaro Architecture, Inc.), on behalf of owners, Jennifer and Carl Myers, for review of a Certificate of Appropriateness-HD to allow the construction of a new 1.5-story Carriage House of approximately 678 SF and a new Carriage House of approximately 1013 SF attached to the main residence located at 3 Blue Crab Street in the Tabby Roads Development, Old Town Bluffton Historic District and zoned Neighborhood General-HD. (COFA-11-24-019448) (Staff – Charlotte Moore)
3. **71 Bridge Street:** A request by Ed Johns, Jr. (LowCountry Custom Built Homes), on behalf of owners, Jim and Julie Lewellyn, for review of a Certificate of Appropriateness - HD to allow the construction of a 2.5-story main residence of approximately 5,365 SF and a 2-story Carriage House of approximately 1200 SF located at 71 Bridge Street in the Old Town Bluffton Historic District and zoned Neighborhood Conservation-HD. (COFA-11-24-019447) (Staff – Charlotte Moore)

#### VI. DISCUSSION

#### VII. ADJOURNMENT

**NEXT MEETING DATE: Monday, December 23, 2024**

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

*In accordance with the requirements of Title II of the Americans with Disabilities Act of 1990 ("ADA"), the Town of Bluffton will not discriminate against qualified individuals with disabilities on the basis of disability in its services, programs, or activities. The Town of Bluffton Council Chambers are ADA compatible. Auditory accommodations are available. Any person requiring further accommodation should contact the Town of Bluffton ADA Coordinator at 843.706.4500 or [adacoordinator@townofbluffton.com](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, December 23, 2024 at 4:00  
P.M.

has been CANCELED  
due to lack of agenda items.

The next meeting is scheduled for  
Monday, December 30, 2024.

If you have questions, please contact  
Growth Management at: 843-706-4500



# **PUBLIC NOTICE**

## THE HISTORIC PRESERVATION REVIEW COMMITTEE (HPRC)

Meeting scheduled for

Monday, December 30, 2024 at 4:00  
P.M.

has been CANCELED  
due to lack of agenda items.

The next meeting is scheduled for  
Monday, January 6, 2025.

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, December 17, 2024, at 6:00 P.M.

has been CANCELED  
due to lack of agenda items.

The next meeting is scheduled for  
Tuesday, January 21, 2024.

If you have questions, please contact  
Growth Management at: 843-706-4500



## Affordable Housing Committee Meeting

Thursday, December 05, 2024 at 10:00 AM

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

### AGENDA

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

**I. CALL TO ORDER**

**II. ROLL CALL**

**III. ADOPTION OF MINUTES**

1. November 7, 2024

**IV. PUBLIC COMMENT**

**V. OLD BUSINESS**

**VI. NEW BUSINESS**

1. FY2025 Neighborhood Assistance Program Budget Update

**VII. DISCUSSION**

1. Forino Construction, Roger Bright, Director of Business Development

**VIII. ADJOURNMENT**

**NEXT MEETING DATE: Thursday, January 9, 2025**

*“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>*

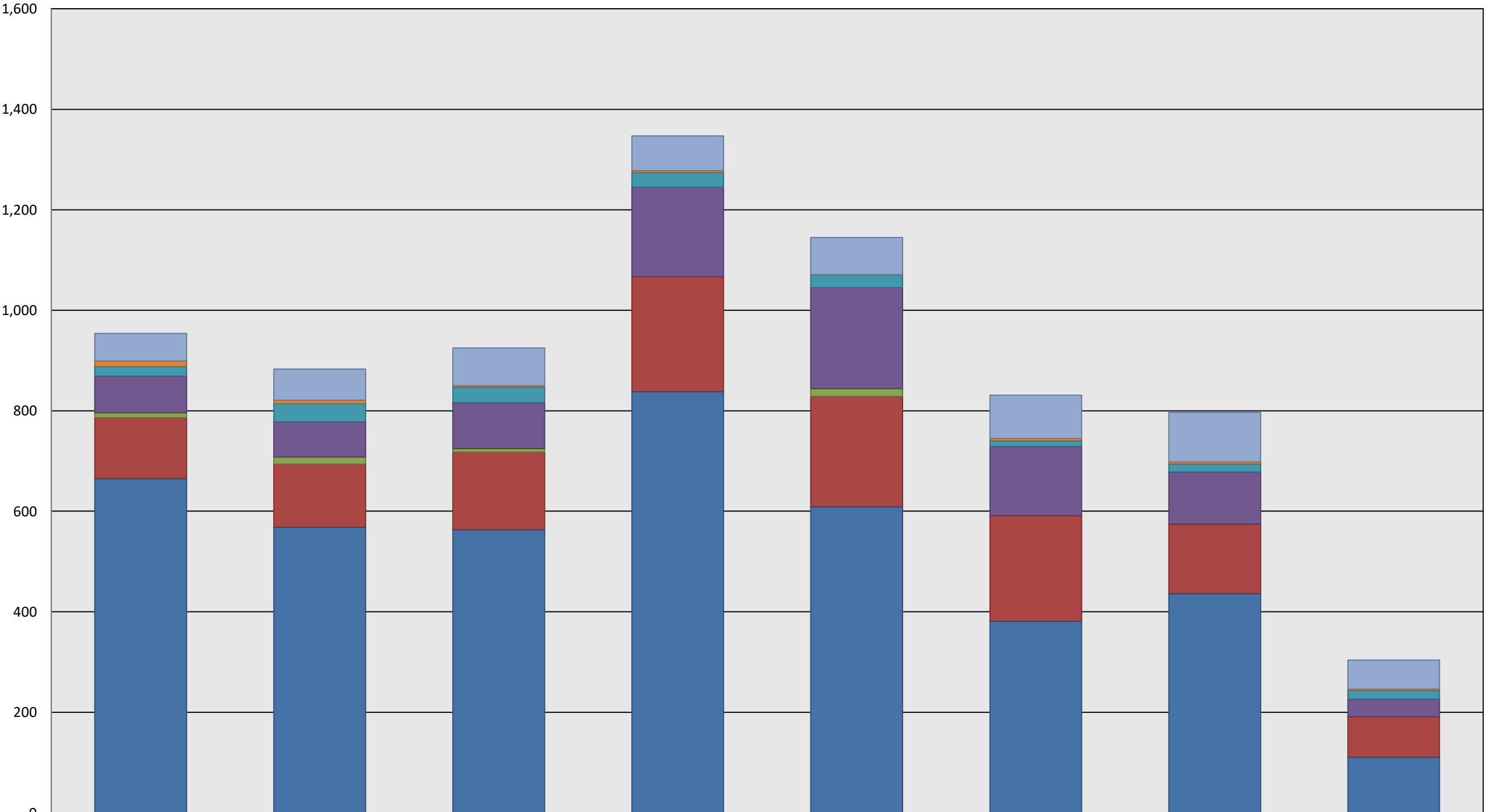
*Public comment is limited to 3 minutes per speaker.*

Town of Bluffton  
Building Permits Issued  
FY 2018 - 2025

Attachment 8a

Section XI. Item #1.

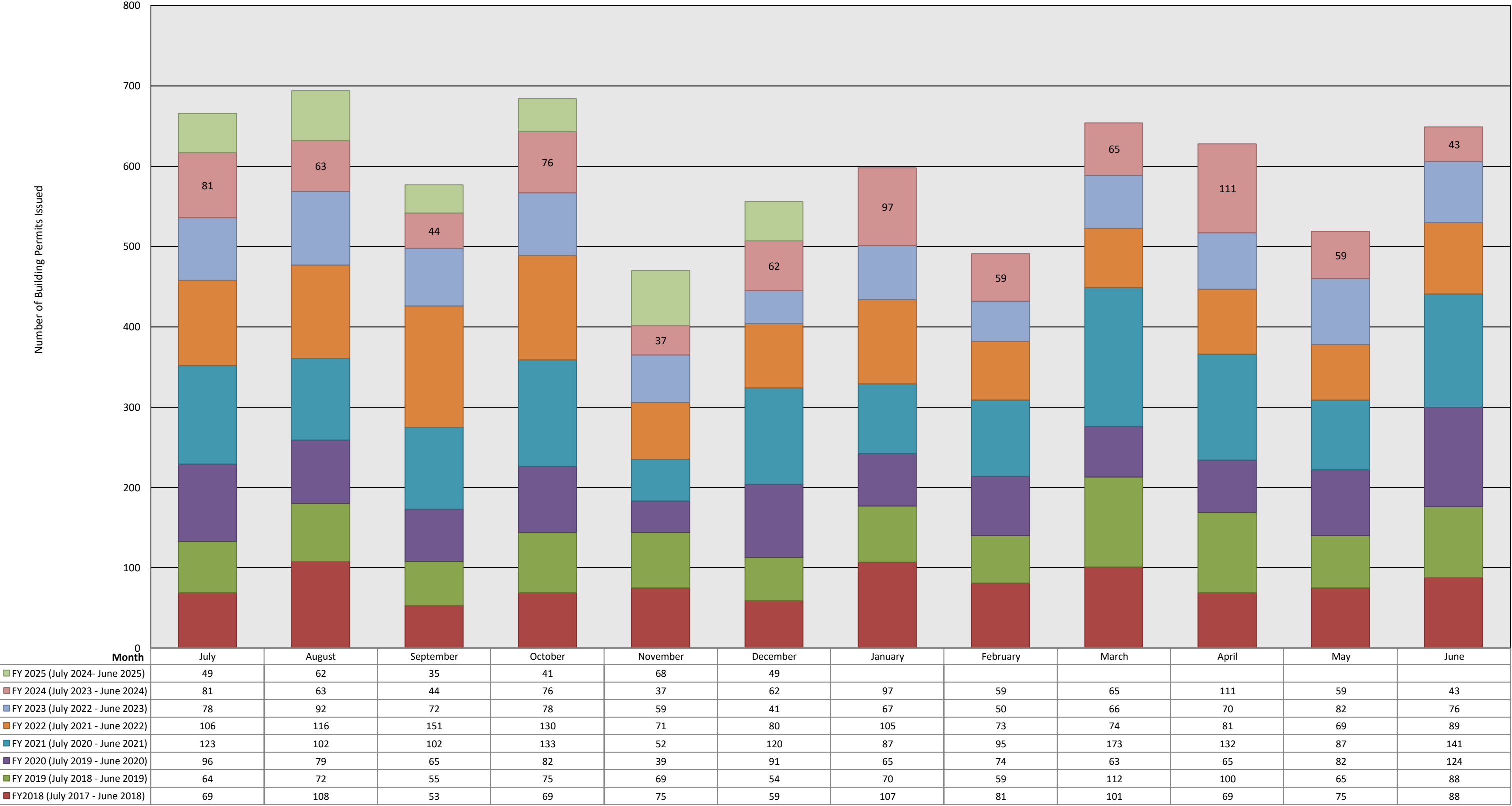
Number of Building Permits Issued



Year	FY2018 (July 2017 - June 2018)	FY 2019 (July 2018 - June 2019)	FY 2020 (July 2019 - June 2020)	FY 2021 (July 2020 - June 2021)	FY 2022 (July 2021 - June 2022)	FY 2023 (July 2022 - June 2023)	FY 2024 (July 2023 - June 2024)	FY 2025 (July 2024- June 2025)
Other Commercial	55	62	75	69	74	86	99	58
Commercial Addition	11	7	3	4	1	5	4	3
New Commercial Construction/ Tenant Upfit	19	36	31	29	25	11	16	17
Other Residential	73	70	91	178	201	138	104	35
New Multi Family - Apartments	10	14	7	0	15	0	0	0
Residential Addition	121	126	155	229	220	210	138	81
New Single Family	665	568	563	838	609	381	436	110

Notes: 1. Building Permits Issued excludes those Building Permits which were voided or withdrawn.  
2. Residential addition includes: additions, screen enclosures, carport, re-roof, modular.  
3. Other residential includes: new accessory structure, new accessory residence.  
4. Commerical addition includes: additions, screen enclosure, shell.  
5. Other commerical includes: remodel and accessory structure.

Town of Bluffton  
Building Permits Issued Per Month  
FY 2018 - 2025

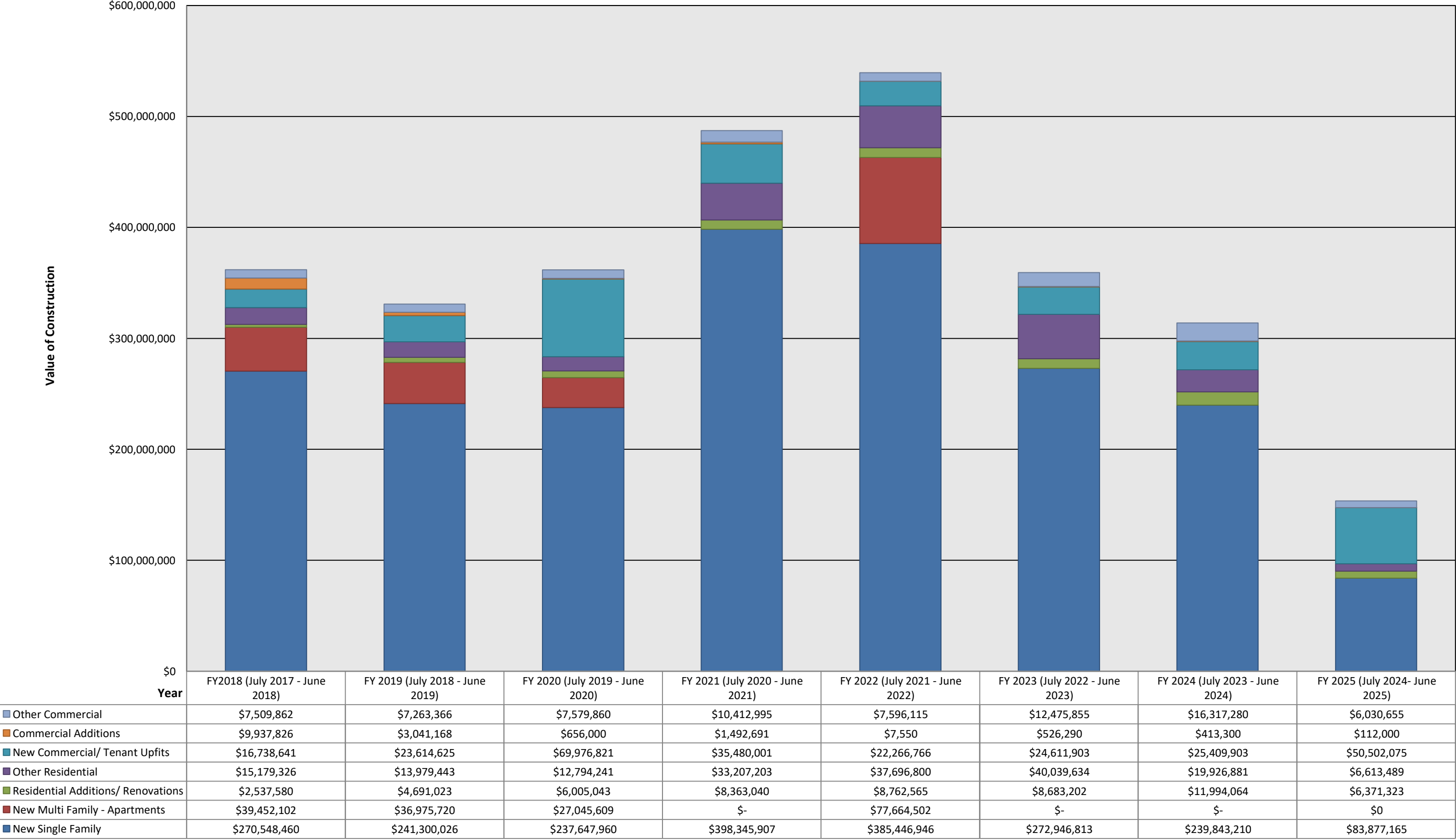


Notes: 1. Building Permits Issued excludes those Building Permits which were voided or withdrawn.

Town of Bluffton  
Value of Construction  
FY 2018 - 2025

Attachment 8c

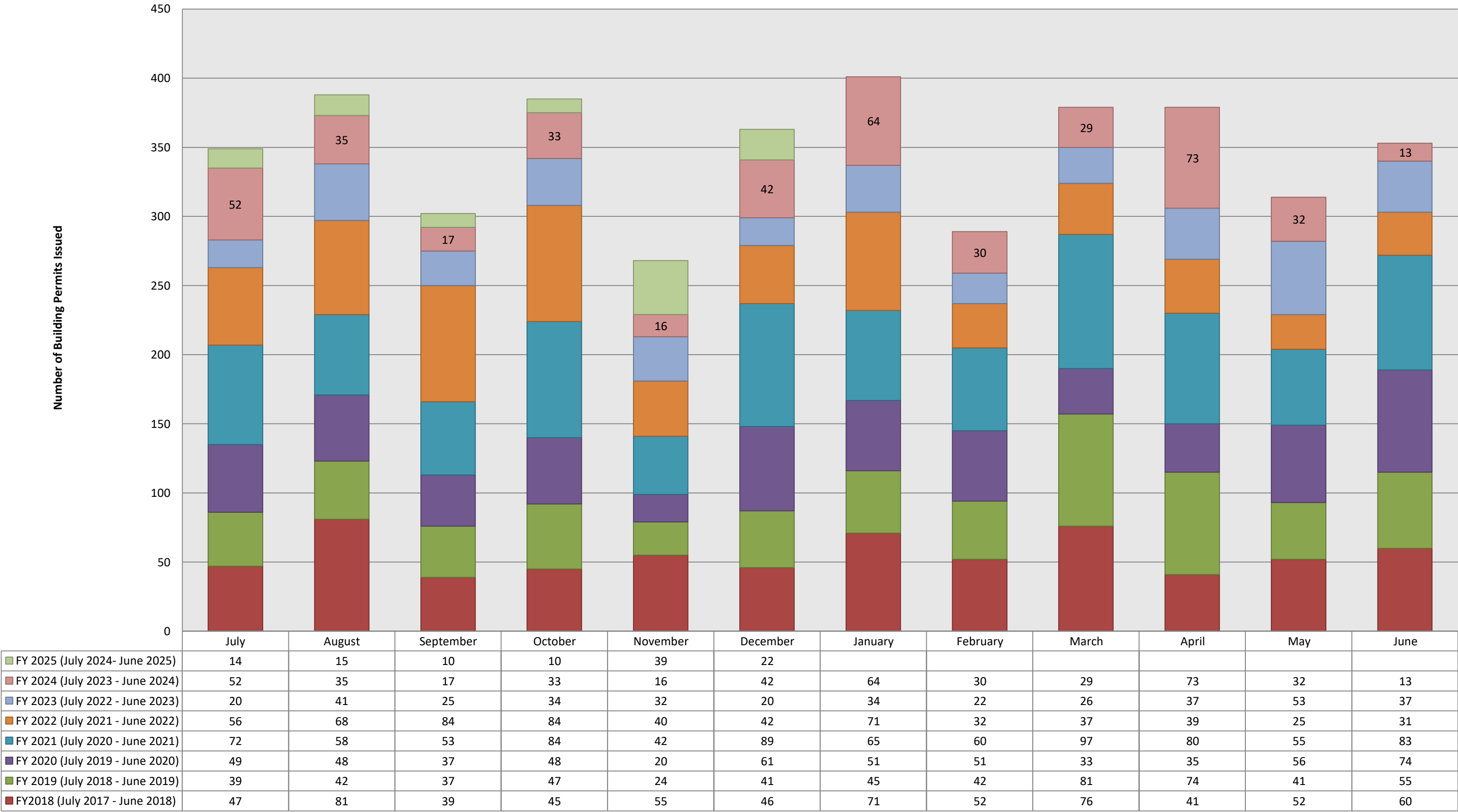
Section XI. Item #1.



Notes: 1. Residential addition includes: additions, screen enclosures, carport, re-roof, modular.  
2. Other residential includes: new accessory structure, new accessory residence.  
3. Commerical addition includes: additions, screen enclosure, shell.  
4. Other commerical includes: remodel and accessory structure.

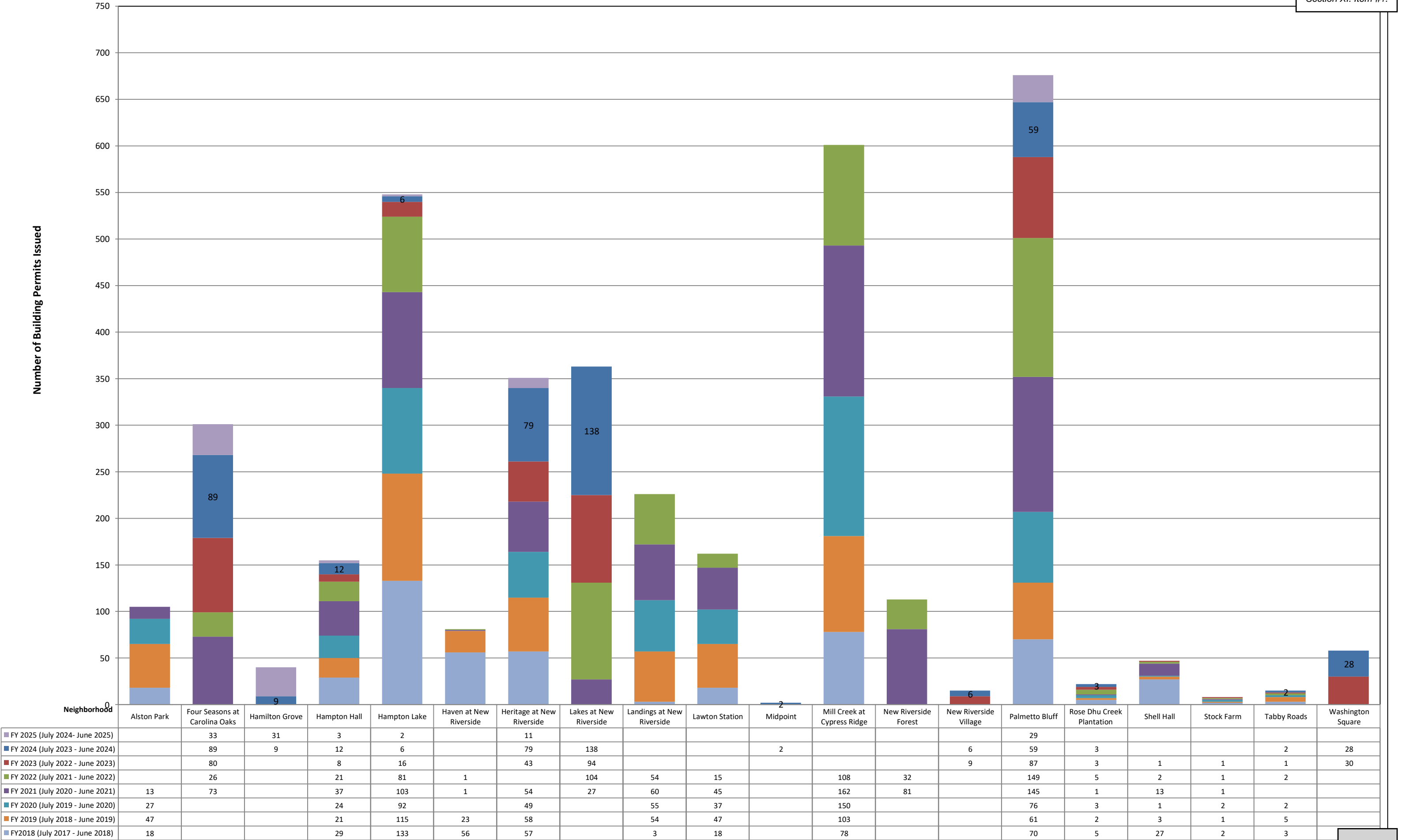


Town of Bluffton  
New Single Family Residential Building Permits Issued Per Month  
FY 2018 - 2025



Note: Building Permits Issued excludes those Building Permits which were voided or withdrawn.

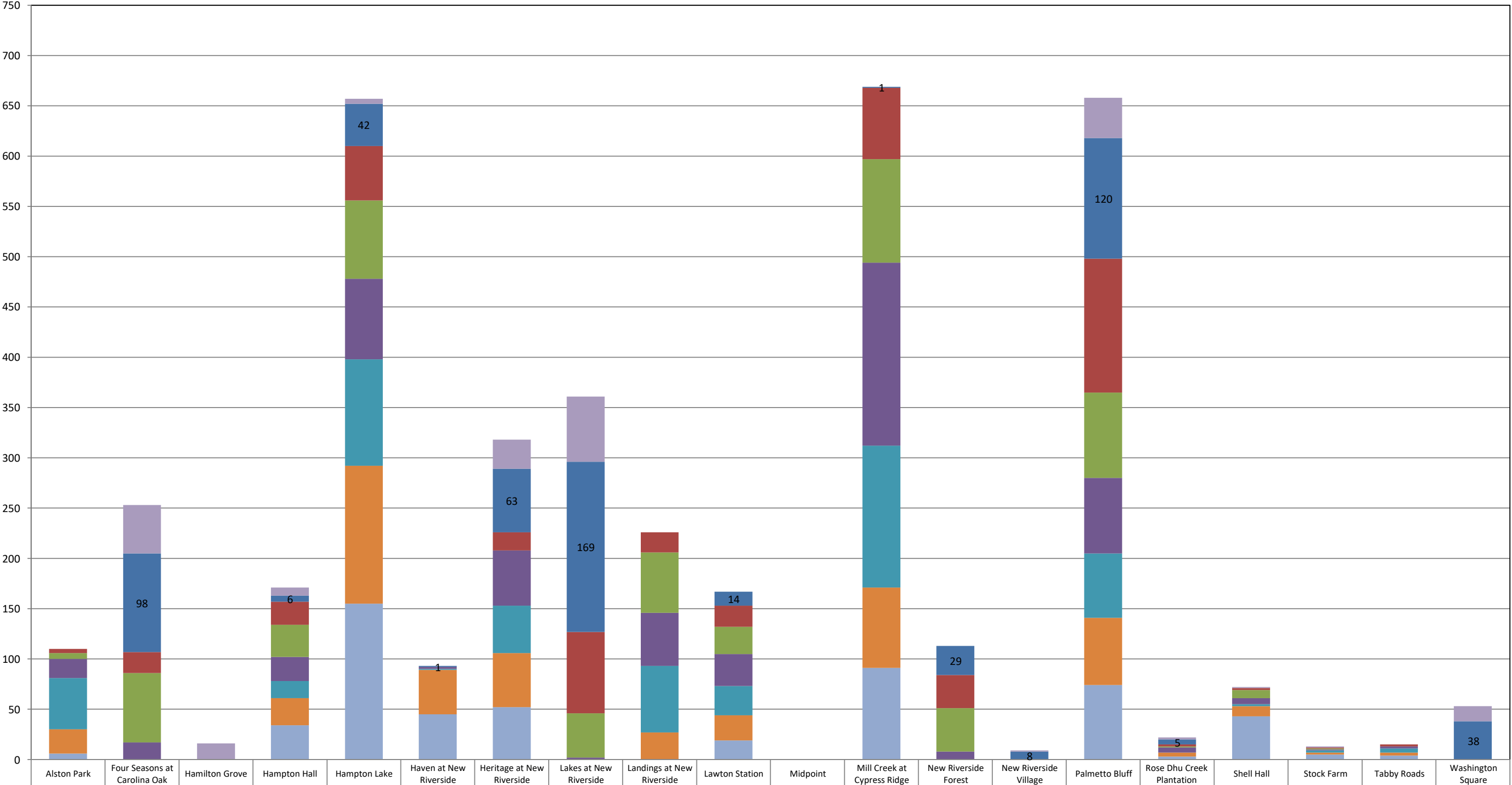
Town of Bluffton  
New Single Family Residential Building Permits Issued by Neighborhood FY 2018 -2025



Town of Bluffton

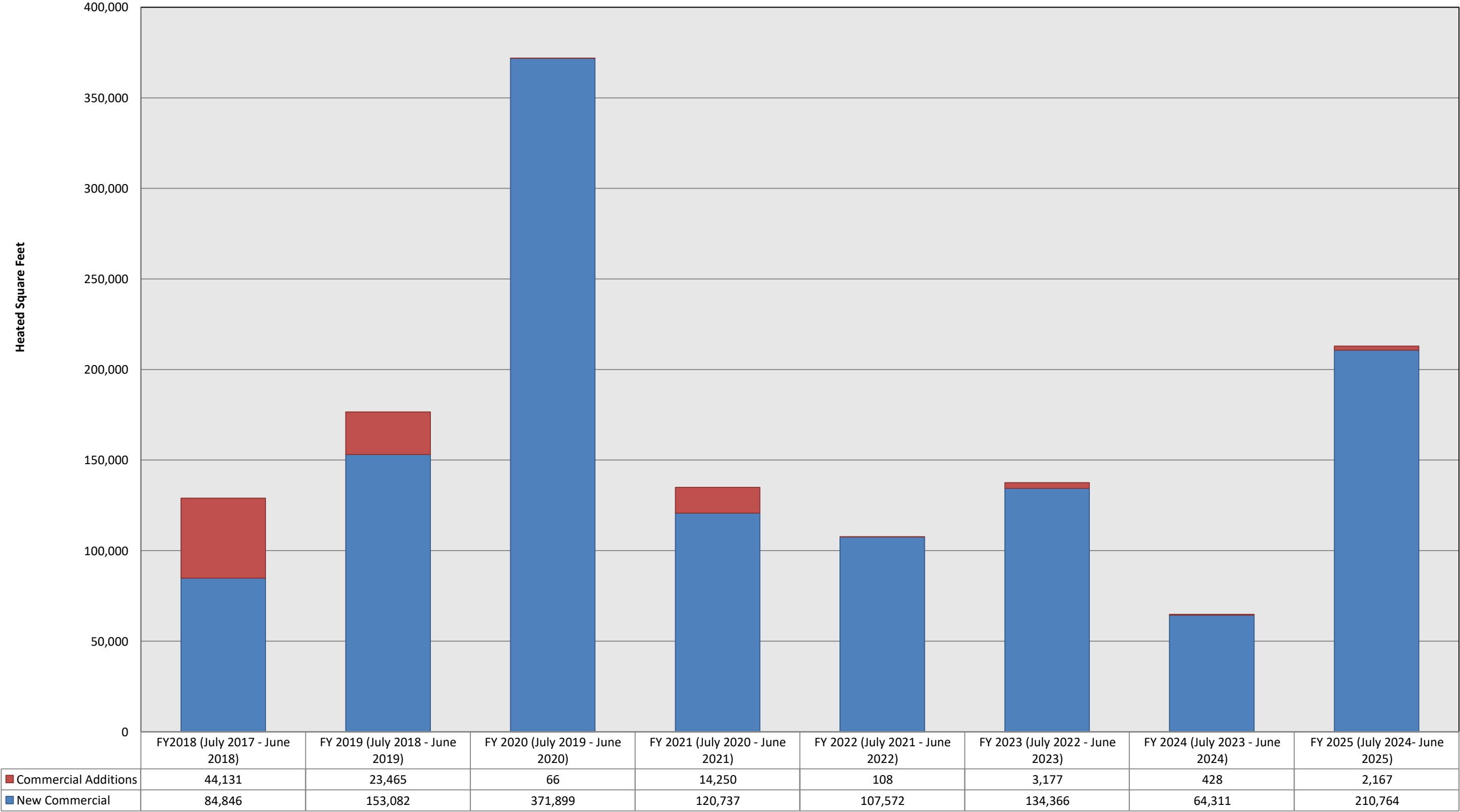
New Single Family Certificates of Occupancy Issued by Neighborhood FY 2018 - 2025

Number of New Housing Starts



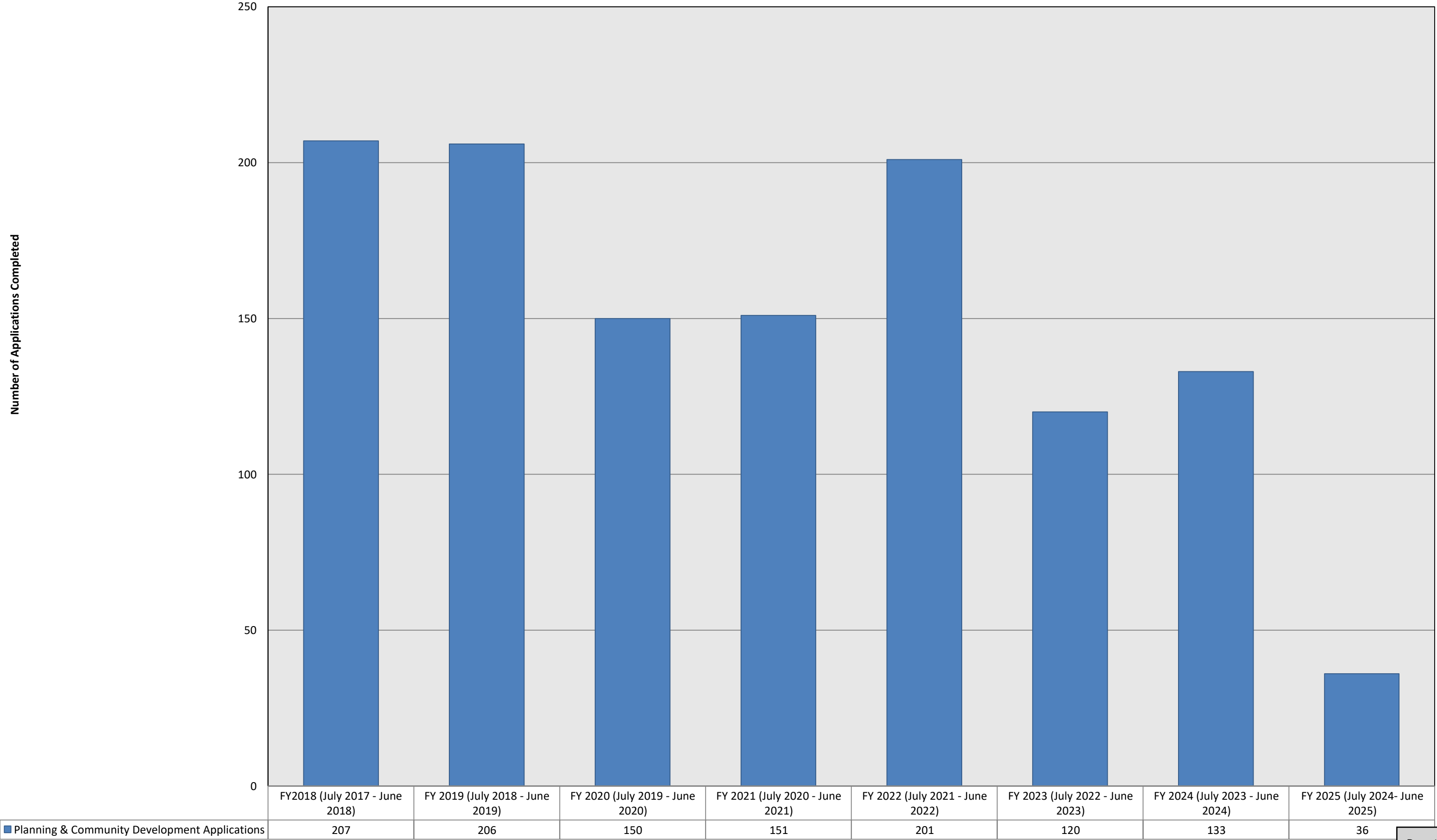
FY 2025 (July 2024- June 2025)		48	16	8	5		29	65											15
FY 2024 (July 2023 - June 2024)		98		6	42	1	63	169		14		1	29	8	120	5			38
FY 2023 (July 2022 - June 2023)	4	21		23	54		18	81	20	21		71	33		133	2	2	1	2
FY 2022 (July 2021 - June 2022)	6	69		32	78			44	60	27		103	43		85	1	8	1	
FY 2021 (July 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
FY2018 (July 2017 - June 2018)	6			34	155	45	52			19		91			74	3	43	5	4

Town of Bluffton  
New Commercial Construction and Additions Heated Square Footage  
FY 2018 - 2025



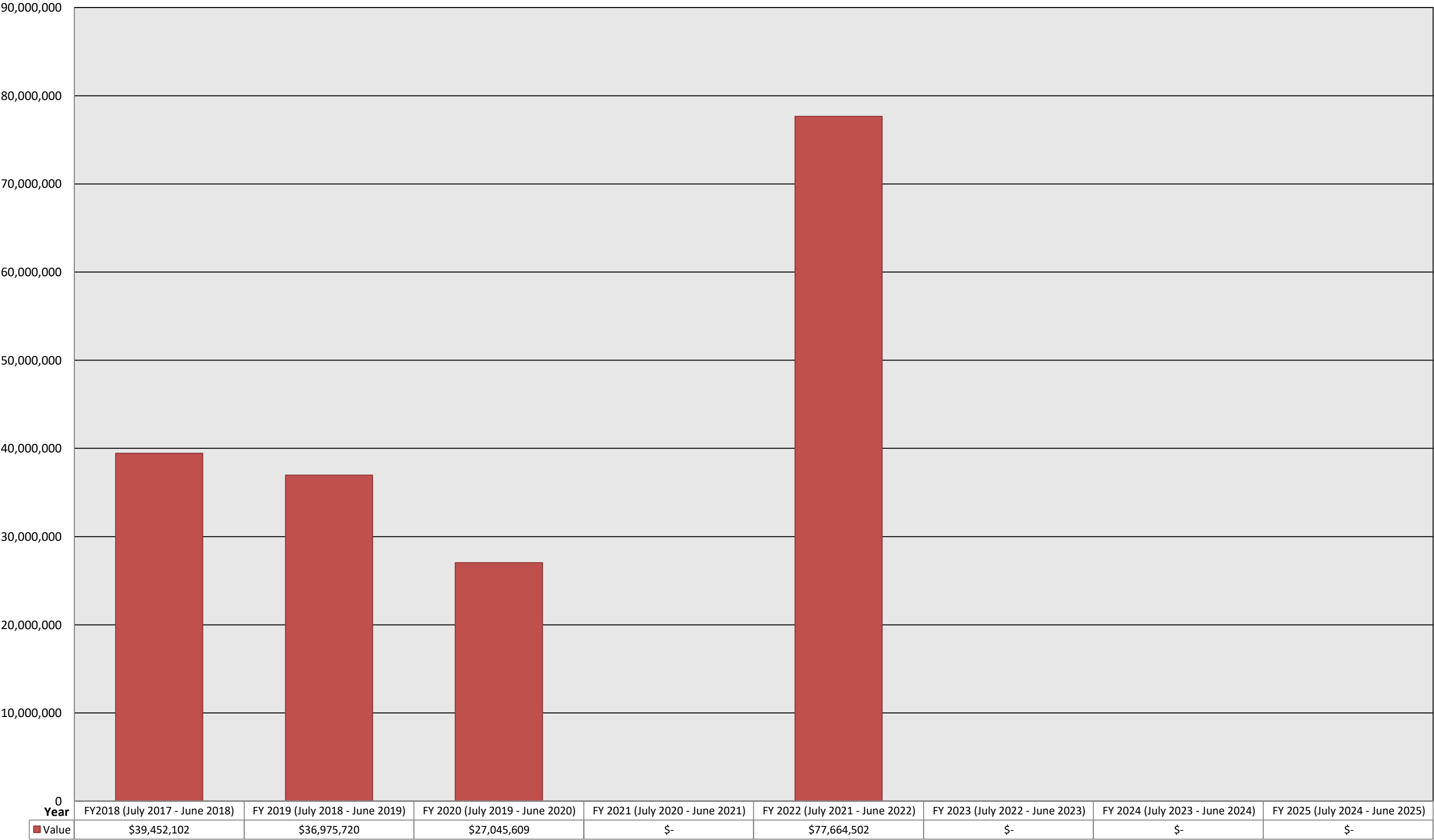
Town of Bluffton  
Planning & Community Development Applications Completed  
FY 2018 - 2025

Number of Applications Completed



Town of Bluffton  
Multi Family Apartments Value  
FY 2018 - 2025

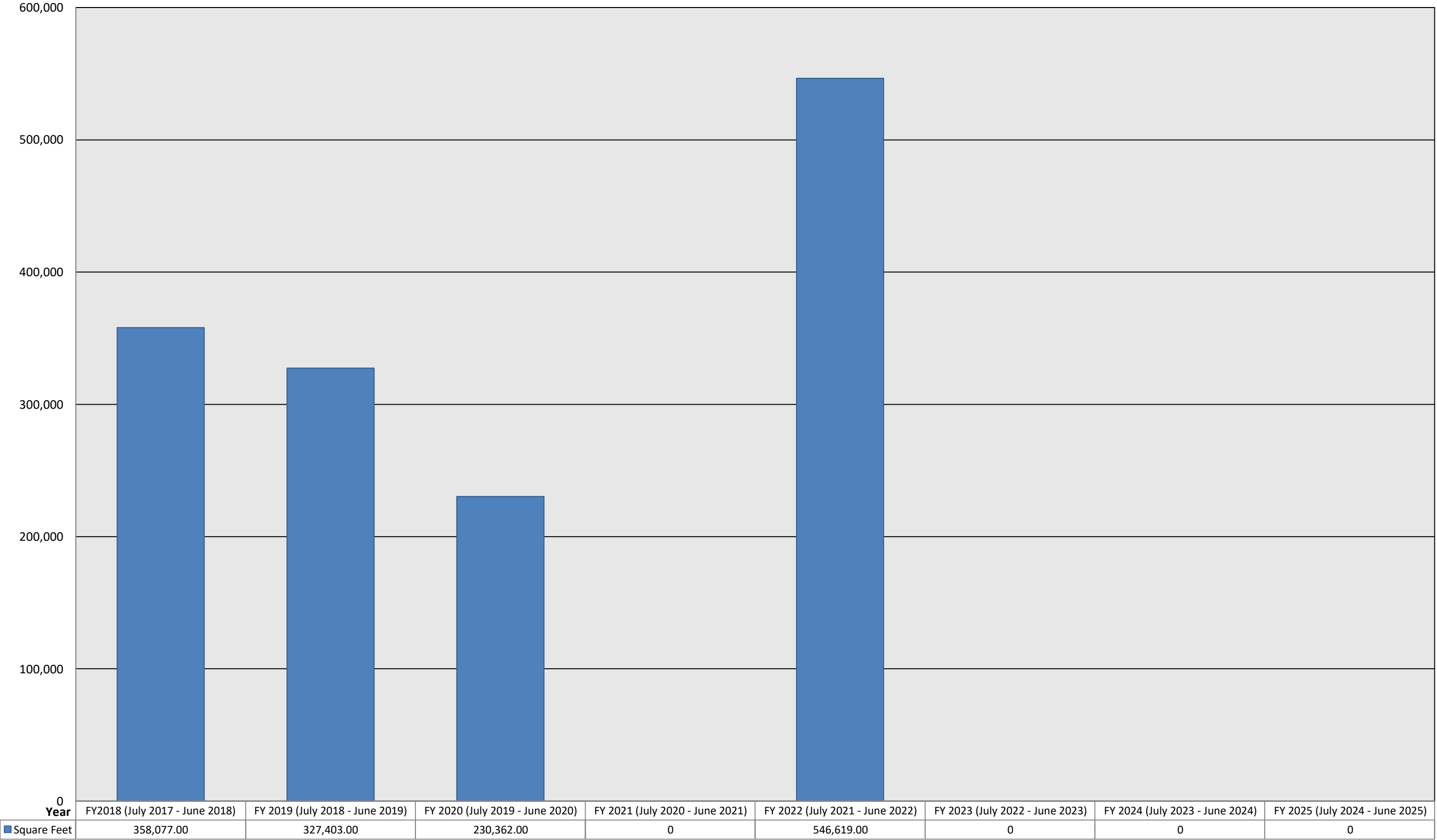
Value of Multi Family Apartments





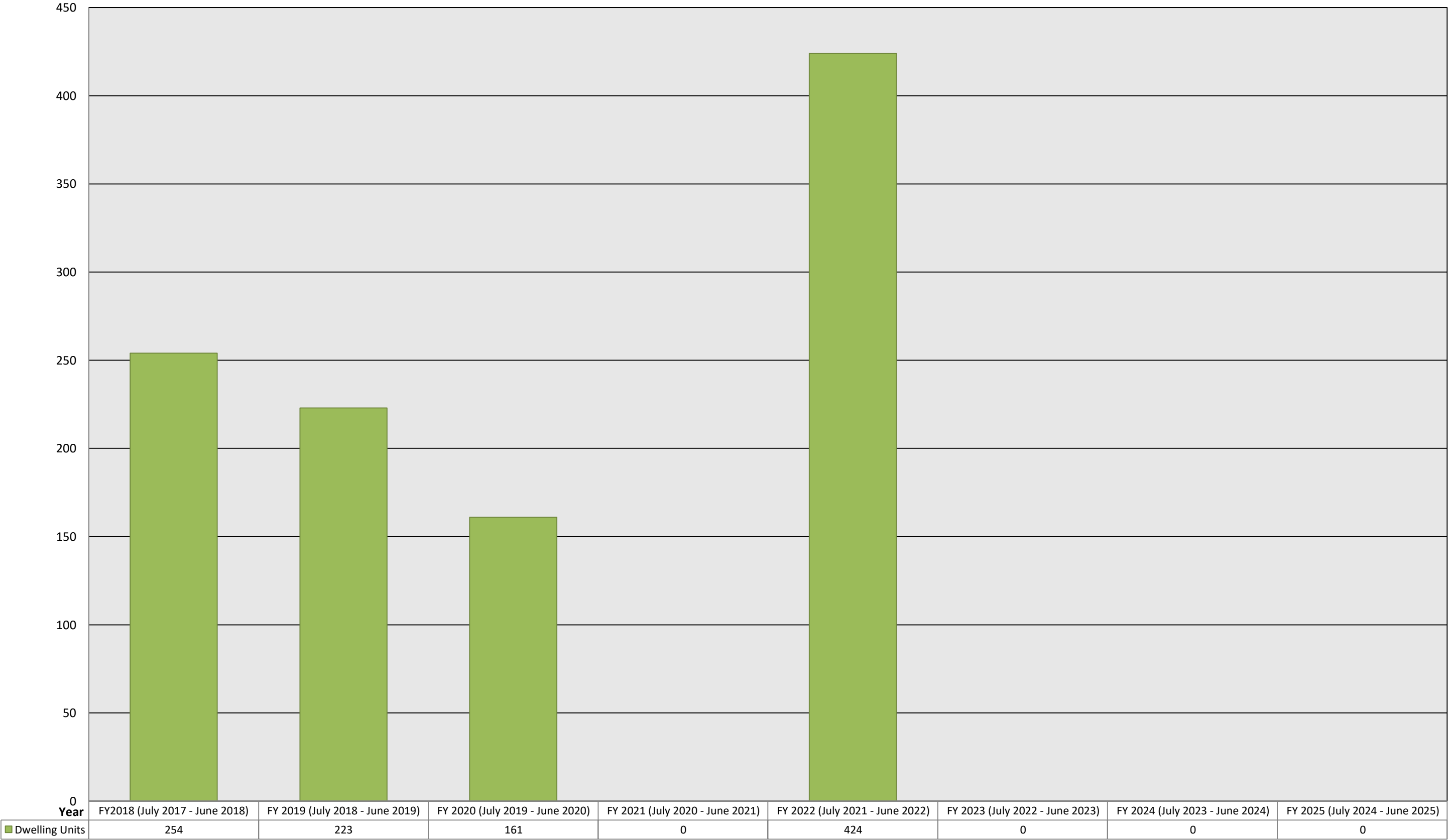
Town of Bluffton  
Multi Family Apartments Square Footage  
FY 2018 - 2025

Square Footage of Multi Family Apartments



Town of Bluffton  
Multi Family Apartments Total Units  
FY 2018 - 2025

Multi Family Apartments Total Units





# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Annexation Petition

100%

ANNX-03-24-019045	03/14/2024		Annexation Petition	Active	Aubrie Giroux
-------------------	------------	--	---------------------	--------	---------------

**Applicant:** Bryant and Son Trucking Company

**Owner:** Bryant and Son Trucking Company

**PLAN DESCRIPTION:** A request by the applicant and property owner Johnnie Bryant III, for approval of an annexation application. The property is located at 30 Davis Road and consists of approximately 2.14 acres identified by tax map number R600 029 000 0028 0000 and currently zoned T2R Rural in unincorporated Beaufort County. This application is associated with the following zoning map amendment request; ZONE-03-24-019046.

STATUS: This request was heard at the May 22, 2024, Planning Commission Meeting as a Public Workshop item.

STATUS: The Public Hearing for the zoning map amendment and comprehensive plan amendment are tentatively scheduled for the July 24, 2024, Planning Commission meeting.

#### PROJECT NAME:

ANNX-11-23-018624	11/01/2023		Annexation Petition	Active	Aubrie Giroux
-------------------	------------	--	---------------------	--------	---------------

**Applicant:** University Investments

**Owner:** University Investments

**PLAN DESCRIPTION:** annexation and rezoning of parcel 12D , part of the Grande Oaks Property at the NW corner of the intersection of Buckwalter Pkwy and lake point Dr into buckwalter PUD. Annexation and rezoning of parcels 12D, 14A, 14 & 16. Part of the Grande Oaks Property at the NW corner of the intersections of Buckwalter Pkwy and Lake Point Dr into the Buckwalter PUD as Grande Oaks Commons. This application is associated with the following requests; COMP-01-24-018844, ZONE-01-24-018840 (Map), ZONE-02-24-018991 (Text), DAA-01-24-018842, and CPA-01-24-018845.

STATUS: Comments on the associated Concept Plan Amendment were heard at the March 27, 2024 meeting of the DRC.

STATUS: This request was heard at the May 22, 2024, Planning Commission Meeting as a Public Workshop item.

STATUS: The Public Hearing for the zoning map amendment and comprehensive plan amendment are tentatively scheduled for the July 24, 2024, Planning Commission meeting.

#### PROJECT NAME:

Total Annexation Petition Cases: 2



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Certificate of Appropriateness

#### Highway Corridor Overlay District

COFA-08-22-017145	08/31/2022	6201 JENNIFER COURT	Certificate of Appropriateness	Active	Katie Peterson
-------------------	------------	---------------------	--------------------------------	--------	----------------

**Applicant:** Witmer Jones Keefer Ltd.

**Owner:** Micheal Bradley Holdings LLC

**PLAN DESCRIPTION:** The River Dog Brewing project involves the construction of a ±50,000 SF two-story building, housing a brewing production facility, retail sales area, and restaurant/bar upon three existing lots on Jennifer Court at the intersection of Buck Island Road and May River Road. As a brief history – back in 2000 AEC permitted the Bright Commercial Subdivision master-planned for five individual commercial development parcels involving a new connector roadway between Buck Island Road and May River Road, incorporating both wet and dry utilities as well as storm drainage stub outs to each parcel. The development was designed, permitted and constructed under the Beaufort County development ordinance prior to annexation by the Town of Bluffton. Subsequently, Parker's convenience store was constructed upon two of the five parcels and, due to greater stormwater regulation, was required to provide additional water quality treatment consisting of shallow bioretention ponds/swales. The River Dog Brewing project parcels are identified as R600 039 000 0021 0000, R610 039 000 0756 0000, and R610 039 000 0757 0000. The property is zoned Neighborhood Core with the adjacent properties being the same.

STATUS[11.17.2022]: The application was approved with conditions at the November 16, 2022 Planning Commission meeting. Awaiting resubmitted documents addressing Planning Commission conditions.

7.18.23: Have not yet received resubmittal.

1.5.2024: Architectural items have been addressed by 1/5 resubmittal. Exempt plat, Development Plan and Lighting resubmittal still required.

**PROJECT NAME:** BUCK ISLAND/SIMMONSVILLE



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Certificate of Appropriateness

COFA-03-23-017836	03/28/2023	45 SLATER ST STREET	Certificate of Appropriateness	Active	Katie Peterson
-------------------	------------	---------------------	--------------------------------	--------	----------------

**Applicant:** EIG14T RCCC 229 SC-Bluffton LLC      **Owner:** EIG14T BBMA SC BLUFFTON LLC

**PLAN DESCRIPTION:** A request by Samantha Kozlowski, Development Manager, on behalf of the owners, EIG14T BBMA SC BLUFFTON, LLC for approval of a Certificate of Appropriates – Highway Corridor Overlay. The project consists of the construction of a +/- 11,953 SF Big Blue Marble Academy (child care facility), along with the related infrastructure, landscaping and lighting. The site is identified by tax map number R614 028 000 5285 0000, located at the intersection of Mill Creek Blvd. and Okatie Highway and is zoned Cypress Ridge PUD.

STATUS [3/29/2023]: Applicant notified of incomplete submittal via email 3/29/23. Awaiting Resubmittal. No Final DP has been submitted, missing landscape plan, lighting plan, dumpster elevations, color board.

7.18.23: The Application was heard at the 6.28.23 Planning Commission meeting. It was tabled for the applicant to address PC comments. Awaiting resubmitted materials addressing PC comments prior to placing it back on the PC agenda.

10.23.23: The revised submittal has been placed on the 10.25.23 PC Agenda.

Approved. See attached.

Amendment submitted 5/8. Email sent to applicant that vents which have been placed on front elevation must be relocated to rear.

#### PROJECT NAME:

COFA-09-24-019322	09/04/2024		Certificate of Appropriateness	Active	Charlotte Moore
-------------------	------------	--	--------------------------------	--------	-----------------

**Applicant:** Brian Witmer      **Owner:** Millstone Management LLC

**PLAN DESCRIPTION:** A request by Witmer Jones Keefer, on behalf of Parcel 8A, LLC, for review of a Certificate of Appropriateness - Highway Corridor Overlay application. The project consists of six residential buildings, to include approximately 150 units, four garage buildings, a clubhouse, amenities and associated infrastructure. The property is zoned Buckwalter PUD and consists of approximately 16.0 acres identified by tax map number R610 028 000 0921 0000 located within the Parcel B-1 Master Plan.

STATUS: The conceptual COFA was heard at the October 9, 2024, Development Review Committee meeting.

STATUS: A resubmittal was provided on October 23, 2024 and is tentatively scheduled for the November 20, 2024 Planning Commission meeting.

STATUS (11.20.2024): Approved by PC with conditions.

STATUS 12/9/24: The Applicant provided architectural drawings for review and approval prior to submitting lighting and landscaping for overall COFA approval.

#### PROJECT NAME:



# Growth Management Application Update Report

Attach

Section XI. Item #1.

Town of Bluffton

Department of Growth Management

Office of Planning and Community Development

20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Certificate of Appropriateness

COFA-09-24-019355 09/23/2024 9220 EVAN WAY Certificate of Appropriateness Active Charlotte Moore

**Applicant:** Breck Delaney

**Owner:** CVS 75651 SC, LLC

**PLAN DESCRIPTION:** A request by Shelbi D'Avignon of Boos Development Group, Inc. on behalf of CVS 7651 SC, LLC, for review of a Certificate of Appropriateness - Highway Corridor Overlay District application. The project consists of an 11,286 SF retail, clinic and pharmacy with drive through and associated infrastructure. The property is zoned Jones Estate PUD and consists of approximately 1.911 acres, identified by tax map number 6R610 036 000 0979 0000 located within the May River Crossing Master Plan and falls within the Town of Bluffton Highway Corridor Overlay District. (See DP-04-24-019111 for development plan set)  
STATUS: This item will be heard at the October 30, 2024 Development Review Committee Meeting.  
STATUS: COFA-HCO reviewed at 10.30.2024 DRC meeting. Awaiting final plan submission.

**PROJECT NAME:** TOWNE CENTRE AT NEW RIVERSIDE

COFA-08-23-018440 08/31/2023 2411 OKATIE HWY HIGHWAY Certificate of Appropriateness Active Katie Peterson

**Applicant:** Witmer Jones Keefer Ltd.

**Owner:** Charlie and Brown

**PLAN DESCRIPTION:** Car Village: A request by Dan Keefer on behalf of Charlie and Brown LLC for review of a Certificate of Appropriateness - Highway Corridor Overlay District application. The project consists of 10,000 SF of commercial/luxury car dealership space, 10,000 SF of clubhouse space, 5 buildings divided into 31 office/condos with a car garage underneath and associated infrastructure. The property is zoned Village at Verdier PUD and consists of approximately 5.00 acres, identified by tax map number R610-021-000-0808-0000 and located on Highway 170 approximately 1,200 feet south of Seagrass Station Road.  
Status: The application will be placed on the October 4, 2023 Development Review Committee Agenda for review.  
Status 10.4.2023: The Application was heard at the 10.4. DRC. Awaiting Stormwater and Final DP review prior to submittal of a Final COFA application. PC members at the DRC meeting provided comment on the mass and scale facing 170, and indicated that if they send an informal resubmittal prior to Final submittal, staff and DRC members of the PC could provide feedback.  
Status: Application is slated for the January 24 PC Agenda.  
Status: The application was approved with conditions at the 1.24.2024 PC meeting. Awaiting resubmitted materials addressing PC conditions.  
DRC Okay with revised windows. Awaiting color board/materials for all buildings and DP Approval.  
7.17.2024: Still have not received Color board/materials for all buildings.  
STATUS 10.09.2024: Reviewed by DRC. Awaiting final plan submittal for Planning Commission review.

**PROJECT NAME:**





# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Certificate of Appropriateness

COFA-01-24-018868	01/17/2024	1 JCS CV COVE	Certificate of Appropriateness	Active	Katie Peterson
-------------------	------------	---------------	--------------------------------	--------	----------------

**Applicant:** Pearce Scott Architects

**Owner:** GOF, LLC

**PLAN DESCRIPTION:** JC's Cove Rec Building: A request by Pearce Scott Architects, on behalf of the Owner, Jim Saba, for a review of a Certificate of Appropriateness - HD to construct a new 2-story recreation building of approximately 2,915SF to be located at 1 JCs Cove, identified by tax map number R610 039 000 1129 0000, zoned Agricultural, and located within the Highway Corridor Overlay district.

Status: The Conceptual Application was heard by the DRC at their February 21, 2024 meeting and comments provided to applicant. Awaiting final submittal.

**PROJECT NAME:** JC'S COVE

### Historic District

COFA-03-24-019047	03/15/2024	34 TABBIE SHELL RD ROAD	Certificate of Appropriateness	Active	Katie Peterson
-------------------	------------	-------------------------	--------------------------------	--------	----------------

**Applicant:** Clear Cut Construction

**Owner:** William Glover

**PLAN DESCRIPTION:** A request by Clear Cut Construction, on behalf of the owner, William Glover, for the review of a Certificate of Appropriateness-HD to allow the construction of a new 2-story Single Family Residential Structure of approximately 2,325 SF and Carriage House structure of approximately 1,174 SF, located at 34 Tabby Shell Road, Lot 18 in the Tabby Roads Development, in the Old Town Bluffton Historic District, within the Neighborhood General - HD zoning district.

Status: The Application was heard at the April 15, 2024 HPRC meeting where comments were provided to the Applicant. Awaiting Final Submittal.

STATUS 09.19.2024: Final Plan received 09.03.2024. Scheduled for November 6 HPC.

STATUS (11.06.2024): Tabled to January 2025 meeting to address multiple HPC comments.

STATUS (12.06.2024): Emailed applicant for update on status of revision. Must be submitted no later than December 11 for a January HPC review.

**PROJECT NAME:** TABBIE ROADS PHASE 1



# Growth Management Application Update Report

Attachment

Section XI. Item #1.

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					

## Certificate of Appropriateness

COFA-11-21-016057 11/04/2021 58 CALHOUN ST Certificate of Appropriateness Active Katie Peterson

**Applicant:** Court Atkins Architects Inc

**Owner:** May River Montessori

**PLAN DESCRIPTION:** May River Montessori: Awaiting resubmittal:

A request by Court Atkins Architects, Inc., on behalf of the owner, May River Montessori, for review of a Certificate of Appropriateness- HD to allow the construction of a new 2-story building of approximately 5,800 SF located at 58 Calhoun Street, in the Old Town Bluffton Historic District and zoned Neighborhood Center-HD.

STATUS [11/5/2021]: The application is currently being reviewed by Staff for conformance with the Unified Development Ordinance (UDO), Traditional Construction Patterns, and any development plans associated with the parcel and is scheduled for review by the HPRC at the December 6, 2021 meeting.

STATUS [12/8/2021]: The application was reviewed at the December 6, 2021 HPRC meeting and comments were provided to the Applicant. Staff is awaiting the approval of the Development Plan and submission of a final application for full HPC review.

STATUS [1.20.2023]: A Final Application has been received and the item is slated to be heard at the February 1, 2023 HPC meeting.

STATUS 2.1.2023: The Application was approved with conditions at the 2.1.23 HPC meeting. Staff is awaiting submittal of revised documents addressing all HPC Conditions. 3.27.2023: Revision received - Landscape Plan not in compliance and does not match DP. DP still not approved.

**PROJECT NAME:** OLD TOWN

COFA-04-24-019070 04/01/2024 42 WHARF ST STREET Certificate of Appropriateness Active Charlotte Moore

**Applicant:** John Montgomery

**Owner:** John Montgomery

**PLAN DESCRIPTION:** Residential: A request by John Montgomery for the review of a Certificate of Appropriateness-HD to allow the construction of a new 2-story Single Family Structure of approximately 2,120 SF and 2-story Carriage House structure of approximately 1,120 SF, to be located at 42 Wharf Street, in the Old Town Bluffton Historic District, within the Neighborhood General - HD zoning district.

Status: The Application was heard at the 4.22.2024 HPRC meeting, awaiting final submittal.

9/3/24: Applicant plans to build a 1.5story cottage on the property. House will have a covered porch in the front & screened porch off the kitchen in the middle of the house facing north. The building will be 1206 sq ft on the first and 800 sq ft on the second floor. It is a 3 bed 3 bath house which has been designed by Alison Ramsey Architects, a notable architect in Beaufort who has 40 years experience building houses in the low country including many in Bluffton. He has kept this house in tradition of the historic district in terms of building materials and design. The house will be within the ten foot setback on both sides of the house. In the backyard we will have a firepit in the yard as well as a landscaped turnaround for cars as shown in the landscape plan.

STATUS 9/16/24: A request by John Montgomery, applicant and owner, for review of a Certificate of Appropriateness - HD to construct a new 2-story residential structure of approximately 2,006 SF at 42 Wharf Street in the Old Town Bluffton Historic District and zoned Neighborhood General-HD. Conceptual application is being reviewed and will be placed on the September 30, 2024 HPRC Agenda.

STATUS 09.30.24: HPRC meeting held. Awaiting final submission.

**PROJECT NAME:** OLD TOWN



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Certificate of Appropriateness

COFA-09-24-019336	09/13/2024	5812 GUILFORD PLACE	Certificate of Appropriateness	Active	Charlotte Moore
-------------------	------------	---------------------	--------------------------------	--------	-----------------

**Applicant:** Court Atkins

**Owner:** Walter Strong III

**PLAN DESCRIPTION:** A request by Court Atkins Architects, Inc., Applicant, on behalf of Property Owner, 5812 Guilford Place, LLC, for approval of a Certificate of Appropriateness-HD to construct a new 2-story main building of approximately 2,400 square feet and a connected 2-story carriage house of approximately 1050 square feet at 5812 Guilford Place in Old Town Bluffton Historic District and the Stock Farm Development. The property is zoned Neighborhood General-HD.

#### Existing Conditions

Currently, 5812 Guilford Place is an empty lot with trees and foliage. There is a 2 Story building to the East and an empty lot to the West, with residential construction on the other side of Guilford Place.

#### Proposed Building Construction

The proposed architectural program for the project is a 2 story main structure with a 1170 SF tenant space on the first floor and the 1250 SF Alair Homes office on the second floor. The adjacent connected carriage house has a 525 SF tenant space on each floor. The expected occupancy for each space is Business. There are two exterior stairs, one off of May River Road and the other between the structures.

There are two tabby parapet walls, similar in character to the adjacent Hair and So On Salon and nearby Kelly Caron Designs. Trellises wrap the two-story entry porch off of May River Road, allowing plants to climb the building.

The architectural massing of the building includes simple roof forms with standing seam and asphalt shingle roofing. The exterior materials for the building will be cementitious fiber siding (horizontal and vertical). The porch railing will be metal.

STATUS (10.04.2024): To be reviewed by HPRC October 7. Plans have changed since pre-application meeting.

STATUS 10.07.2024: HPRC meeting held October 7. COFA-HD scheduled for 12.04.2024 HPC meeting.

STATUS 12.04.2024: HPC approved application with conditions; awaiting resubmittal addressing those conditions.

**PROJECT NAME:** OLD TOWN



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Certificate of Appropriateness					
COFA-05-24-019123	05/09/2024	128 BRIDGE ST STREET	Certificate of Appropriateness	Active	Charlotte Moore
Applicant: Manuel Studio, LLC		Owner: Lynda Strong			
PLAN DESCRIPTION: A request by Ansley H Manuel, Architect, on behalf of the Owner Lynda Lee Googe Strong, for review of a Certificate of Appropriateness - HD to construct a new 2-story Carriage House at 128 Bridge Street, in the Old Town Bluffton Historic District and zoned Neighborhood Conservation-HD. Status: Application is being reviewed and will be heard at the 6/3/2024 HPRC meeting. Status 6.4.2024: Awaiting Final Submittal Status 8.28.2024: The final submittal has been received and is tentatively scheduled for the October HPC Agenda. STATUS 09.06.2024: Scheduled for October 2 HPC. STATUS 10.02.2024: Approved by HPC with conditions to be shown on final plan submission.					
PROJECT NAME: OLD TOWN					
COFA-11-24-019458	11/22/2024	17 LAWRENCE ST STREET	Certificate of Appropriateness	Active	Charlotte Moore
Applicant: Incircle Architecture		Owner: Jay & Lori Sofianek			
PLAN DESCRIPTION: A request by Christopher Epps (Incircle Architecture), on behalf of owners, Jay and Lori Sofianek, for review of a Certificate of Appropriateness - HD to allow the construction of a 2-story Carriage House of approximately 1199 SF located at 17 Lawrence Street in the Old Town Bluffton Historic District and zoned Neighborhood General-HD. STATUS (12.09.2024): To be reviewed at 12.16.2024 HPRC meeting.					
PROJECT NAME: OLD TOWN					
COFA-08-24-019275	08/09/2024	95 GREEN ST STREET	Certificate of Appropriateness	Active	Charlotte Moore
Applicant: Low Tide Designs, Inc.		Owner: Glenda Mikulak			
PLAN DESCRIPTION: A request by Sam Liberti with Low Tide Designs, Inc., on behalf of the owner, Glenda Mikulak Roberts, for review of a Certificate of Appropriateness - HD to construct a new 2-story house of approximately 1,987 SF at 95 Green Street, in the Old Town Bluffton Historic District and zoned Neighborhood General-HD. Status: Application is being reviewed and has been placed on the September 3, 2024 HPRC Agenda. Status (9/4): Awaiting Final Plan submission.					
PROJECT NAME: OLD TOWN					



# Growth Management Application Update Report

Attachment

Section XI. Item #1.

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Certificate of Appropriateness					
COFA-08-24-019280	08/13/2024	50 PRITCHARD ST STREET	Certificate of Appropriateness	Active	Charlotte Moore
Applicant: Manuel Studio, LLC		Owner: Beth Boeke McHugh			
PLAN DESCRIPTION: A request by Ansley H. Manuel, architect, on behalf of the owner, Beth McHugh, for review of a Certificate of Appropriateness - HD for a proposed 1-story addition of approximately 595 SF, deck addition, and new metal porch roof located at 50 Pritchard Street in the Old Town Bluffton Historic District and zoned Neighborhood General. STATUS: This item will be heard at the September 9, 2024 Historic Preservation Review Committee meeting. STATUS 09.09.2024: Reviewed at 9/9 HPRC meeting. Awaiting plan submission for HPC review. STATUS (12.17.2024): Scheduled for January 8, 2024 HPC meeting					
PROJECT NAME:		OLD TOWN			
COFA-01-24-018816	01/05/2024	22 BRUIN RD ROAD	Certificate of Appropriateness	Active	Katie Peterson
Applicant: Sean Lewis		Owner: Bertha Wooten			
PLAN DESCRIPTION: A request by Sean A. Lewis, on behalf of the Owner, Bertha Wooten, for a review of a Certificate of Appropriateness - HD to construct a new 1-story of approximately 1,695 with attached Carriage House of approximately 697 SF, to be located at 22 Bruin Road, in the Old Town Bluffton Historic district and zoned Neighborhood General- HD zoning District. Status 1.5.2024: The Application is being reviewed and will be placed on the 1/29/2024 HPRC Agenda. Status 1.30.24: Comments provided to the applicant. Awaiting final submittal.					
PROJECT NAME:		OLD TOWN			
COFA-11-24-019448	11/18/2024	3 BLUE CRAB ST STREET	Certificate of Appropriateness	Active	Charlotte Moore
Applicant: Vaccaro Architect, Inc.		Owner: Jennifer and Carl Myers			
PLAN DESCRIPTION: A request by Mike Vaccaro (Vaccaro Architecture, Inc.), on behalf of owners, Jennifer and Carl Myers, for review of a Certificate of Appropriateness - HD to allow the construction of a new 1.5-story Carriage House of approximately 678 SF and a new Carriage House of approximately 1013 SF attached to the main residence located at 3 Blue Crab Street in the Tabby Roads Development, Old Town Bluffton Historic District and zoned Neighborhood General-HD. STATUS (12.09.2024): To be reviewed by HPRC on 12.16.2024.					
PROJECT NAME:		OLD TOWN			



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Certificate of Appropriateness					
COFA-11-24-019447	11/15/2024	71 BRIDGE ST STREET	Certificate of Appropriateness	Active	Charlotte Moore
Applicant: Johns, Edwin Jr.		Owner: Jim & Julie Lewellyn			
PLAN DESCRIPTION: A request by Ed Johns, Jr. (LowCountry Custom Built Homes), on behalf of owners, Jim and Julie Lewellyn, for review of a Certificate of Appropriateness - HD to allow the construction of a 2.5-story main residence of approximately 5365 SF and a 2-story Carriage House of approximately 1200 SF located at 71 Bridge Street in the Old Town Bluffton Historic District and zoned Neighborhood Conservation-HD. STATUS (12.09.2024): Scheduled for 12.16.2024 HPRC meeting.					
PROJECT NAME:		OLD TOWN			
COFA-05-24-019155	05/24/2024	68 PRITCHARD ST STREET	Certificate of Appropriateness	Active	
Applicant: Tony Pressley		Owner: Tony & Alyssa Pressley			
PLAN DESCRIPTION: A request by Tony and Alyssa Pressley for review of a Certificate of Appropriateness - HD to construct a new 2-story Carriage House of approximately 800 SF at 68 Pritchard Street, in the Old Town Bluffton Historic District and zoned Neighborhood General-HD. Status: The Conceptual Application will be reviewed at the June 17, 2024 HPRC meeting. Status 6.20.2024: Awaiting final Submittal. STATUS 10.07.2024: Final plan submitted; awaiting Town review. STATUS 10.16.2024: Scheduled for November 6 HPC meeting. STATUS (12.06.2024): Item was not scheduled for November agenda. Emailed applicant on 12.06.24 to check status of submission.					
PROJECT NAME:		OLD TOWN			
COFA-08-24-019268	08/02/2024	60 BRUIN RD ROAD	Certificate of Appropriateness	Active	Charlotte Moore
Applicant: Pearce Scott Architects		Owner: Chris Dalzell			
PLAN DESCRIPTION: A request by Sarah Kepple with Pearce Scott Architects, on behalf of the owners, Chris Dalzell and Prestige Worldwide Properties, LLC, for review of a Certificate of Appropriateness - HD to construct a new 2-story Commercial Office structure of approximately 4,220 SF and Commercial Carriage House of approximately 1,100 SF at 60 Bruin Road, Lot 23 in the Tabby Roads Development, in the Old Town Bluffton Historic District and zoned Neighborhood General-HD Status: Conceptual application is being reviewed and will be placed on the August 26, 2024 HPRC Agenda. STATUS: HPRC meeting held. Awaiting resubmittal to take back to HPC. STATUS (12.16.2024): Tentatively scheduled for January 8, 2025 HPC meeting.					
PROJECT NAME:		OLD TOWN			





# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Certificate of Appropriateness

COFA-11-23-018694	11/28/2023	1 BLUE CRAB STREET	Certificate of Appropriateness	Active	Charlotte Moore
-------------------	------------	--------------------	--------------------------------	--------	-----------------

**Applicant:** Court Atkins

**Owner:** Palmetto Pops

**PLAN DESCRIPTION:** A request by Court Atkins Group, on behalf of the owner, April Perez, for a review of a Certificate of Appropriateness - HD to construct a new 2.5 story live/work building of approximately 3,180 SF with business and production facility on the first floor and a 1.5-story residential unit above, and a 2-story Carriage House of approximately 1,060 SF, to be located at 1 Blue Crab Street, Lot 27 in the Tabby Roads Development, in the Old Town Bluffton Historic district and zoned Neighborhood General - HD zoning District.

Status: Application is on HOLD. See attached email.

STATUS 5.10.2024: Hold has been removed and application has been placed on the May 20, 2024 HPRC Agenda.

Status 5.21.2024: Application was heard at the May 20th HPRC meeting where comments were provided to the applicant. Awaiting final submittal.

STATUS (11.06.2024): Scheduled for December HPC meeting.

STATUS (12.04.2024): Application approved with conditions at 12.04.2024 HPC meeting. Awaiting resubmittal addressing conditions.

**PROJECT NAME:** OLD TOWN

**Total Certificate of Appropriateness Cases: 20**

### Comprehensive Plan Amendment

### Comprehensive Plan Amendment



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Comprehensive Plan Amendment

COMP-01-24-018844	01/11/2024		Comprehensive Plan Amendment	Active	Aubrie Giroux
-------------------	------------	--	------------------------------	--------	---------------

**Applicant:** University Investments **Owner:** University Investments

**PLAN DESCRIPTION:** Town Comprehensive Plan Amendment of the Future Land Use Map. This application is associated and will run concurrently with University Investment's applications for annexation, rezoning, Buckwalter PUD Text Amendment to create a new Land Use Tract to be known as Grande Oaks Commons, Buckwalter Development Agreement Amendment, and Buckwalter Concept Plan Amendment for parcels 12D, 14A, 14 & 16 which are currently part of the Grande Oaks PUD and located at the NW corner of the intersections of Buckwalter Pkwy and Lake Point Drive. This application is associated with the following requests; ANNEX-11-23-018624, CPA-01-24-018845, ZONE-01-24-018840 (Map), ZONE-02-24-018991 (Text), and DAA-01-24-018842.

STATUS: Comments on the associated Concept Plan Amendment were heard at the March 27, 2024 meeting of the DRC.

STATUS: This request was heard at the May 22, 2024, Planning Commission Meeting as a Public Workshop item.

STATUS: The Public Hearing for the zoning map amendment and comprehensive plan amendment was held at the July 24, 2024, Planning Commission meeting.

STATUS: The Ordinance 1st Reading took place at the September 10, 2024 Town Council Meeting.

STATUS: The Ordinance 2nd Reading is tentatively scheduled for the November 12, 2024 Town Council meeting.

#### PROJECT NAME:

COMP-06-24-019187	06/17/2024	332 BUCK ISLAND RD ROAD	Comprehensive Plan Amendment	Active	Dan Frazier
-------------------	------------	-------------------------	------------------------------	--------	-------------

**Applicant:** Town of Bluffton **Owner:** Town of Bluffton

**PLAN DESCRIPTION:** A request by the Town of Bluffton for a Comprehensive Plan Amendment of approximately 1.38 acres, located at 328, 330 and 332 Buck Island Road identified as Beaufort County Tax Map Numbers R 610 039 000 0016 0000 (328 and 330 Buck Island Road) and R610 039 000 018C 0000 (332 Buck Island Road) to change the Future Land Use Map Designation from Suburban Living to Neighborhood Center.

STATUS: This item was heard at the September 25, 2024 Planning Commission meeting.

STATUS: The First Reading is tentatively scheduled for the November 12, 2024 Town Council meeting.

**PROJECT NAME:** BUCK ISLAND/SIMMONSVILLE



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Comprehensive Plan Amendment

COMP-05-24-019139	05/16/2024		Comprehensive Plan Amendment	Active	Aubrie Giroux
-------------------	------------	--	------------------------------	--------	---------------

**Applicant:** Town of Bluffton

**Owner:** Town of Bluffton

**PLAN DESCRIPTION:** A request for Comp Plan Amendment for approximately 2.14 acres located at 30 Davis Road and identified by Beaufort County Tax Map No. R600 029 000 0028 0000 to rezone the subject property to the Residential General (RG) District.  
STATUS: This request was heard at the May 22, 2024, Planning Commission Meeting as a Public Workshop item.  
STATUS: The Public Hearing for the zoning map amendment and comprehensive plan amendment was heard and recommendation approved at the July 24, 2024, Planning Commission meeting.  
STATUS: First reading of ordinance at September 10, 2024 Town Council Meeting.

**PROJECT NAME:**

**Total Comprehensive Plan Amendment Cases: 3**

### Concept Plan Amendment

### Concept Plan Amendment

CPA-11-24-019441	11/08/2024		Concept Plan Amendment	Active	Dan Frazier
------------------	------------	--	------------------------	--------	-------------

**Applicant:** Lauren Niemiec

**Owner:** MFH LAND, LLC

**PLAN DESCRIPTION:** Applicant is requesting to convert commercial development to allocate for residential development for property owner by MFH Land, LLC with the community of New Riverside Village. The owner would like to convert seven and 29/100 acres of its commercial development into additional twenty-nine (29) units of residential allocation allowed by right under the terms of the Jones Estate Development Agreement and the New Riverside Concept Plan, both as amended, and the Partial Assignment of Development Right's and Obligations under Concept Plan.

**PROJECT NAME:** NEW RIVERSIDE VILLAGE



# Growth Management Application Update Report

Town of Bluffton

Department of Growth Management

Office of Planning and Community Development

20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Concept Plan Amendment

CPA-01-24-018845 01/11/2024 Concept Plan Amendment Active Dan Frazier

**Applicant:** University Investments **Owner:** University Investments

**PLAN DESCRIPTION:** A request by the property owner, Jake Reed of University Investments LLC, for approval of a concept plan amendment. The applicant is requesting to amend the Buckwalter Tract Development Agreement and Concept Plan to add 65.59 acres as Grande Oaks Commons, including an additional 32.0 acres of General Commercial acreage. The properties are currently zoned Grande Oaks Planned Unit Development in unincorporated Beaufort County and consist of 65.59 acres identified by tax map numbers R600-029-000-2410-0000 and R600-029-000-0014-0000 located in the northwest corner of the intersection of Buckwalter Parkway and Lake Point Drive. This application is associated with the following requests; ANN-11-23-018624, COMP-01-24-018844, ZONE-01-24-018840 (Map), ZONE-02-24-018991 (Text), and DAA-01-24-018842.

STATUS: Comments on this application were heard at the March 27, 2024 meeting of the DRC.

STATUS: This request was heard at the May 22, 2024, Planning Commission Meeting as a Public Workshop item.

STATUS: The Public Hearing for the zoning map amendment and comprehensive plan amendment were heard at the July 24, 2024, Planning Commission meeting.

STATUS: The Ordinance 1st Reading took place at the September 10, 2024 Town Council Meeting.

STATUS: The Ordinance 2nd Reading is tentatively scheduled for the November 12, 2024 Town Council meeting.

**PROJECT NAME:**

**Total Concept Plan Amendment Cases: 2**

### Dev Agreement Amendment

#### PUD

DAA-11-24-019440 11/08/2024 Dev Agreement Amendment Active Dan Frazier

**Applicant:** Lauren Niemiec **Owner:** MFH LAND, LLC

**PLAN DESCRIPTION:** Applicant is requesting to convert commercial development to allocate for residential development for property owner by MFH Land, LLC with the community of New Riverside Village. The owner would like to convert seven and 29/100 acres of its commercial development into additional twenty-nine (29) units of residential allocation allowed by right under the terms of the Jones Estate Development Agreement and the New Riverside Concept Plan, both as amended, and the Partial Assignment of Development Right's and Obligations under Concept Plan.

**PROJECT NAME:**



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Dev Agreement Amendment

Total Dev Agreement Amendment Cases: 1

### Development Agreement

#### Development Agreement

DA-01-24-018842	01/11/2024		Development Agreement	Active	Aubrie Giroux
-----------------	------------	--	-----------------------	--------	---------------

**Applicant:** University Investments

**Owner:** University Investments

**PLAN DESCRIPTION:** Annexation and rezoning of parcels 12D, 14A, 14 & 16. Part of the Grande Oaks Property at the NW corner of the intersections of Buckwalter Pkwy and Lake Point Dr into the Buckwalter PUD as Grande Oaks Commons. This application is associated with the following requests; ANNX-11-23-018624, CPA-01-24-018845, ZONE-01-24-018840 (Map), ZONE-02-24-018991 (Text), and COMP-01-24-018844.

STATUS: Comments on the associated Concept Plan Amendment were heard at the March 27, 2024 meeting of the DRC.

STATUS: This request was heard at the May 22, 2024, Planning Commission Meeting as a Public Workshop item.

STATUS: The Public Hearing for the zoning map amendment and comprehensive plan amendment are tentatively scheduled for the July 24, 2024, Planning Commission meeting.

**PROJECT NAME:**

Total Development Agreement Cases: 1

### Development Plan

#### Development Plan



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Development Plan

DP-10-23-018541	10/05/2023	3000 BIG HOUSE PLANTATION ROAD	Development Plan	Active	Dan Frazier
-----------------	------------	--------------------------------	------------------	--------	-------------

**Applicant:** Thomas & Hutton - USE THIS ACCOUNT

**Owner:**

**PLAN DESCRIPTION:** A request by Drew Lonker of Thomas & Hutton, on behalf of Palmetto Bluff Uplands, LLC, for approval of a preliminary development plan. The project consists of general clearing, installation of water and sewer utilities, 2 sanitary sewer pump stations, dry utilities, storm drainage infrastructure and a pervious paver roadway to serve the proposed 31 single-family residential lots. The property is zoned Palmetto Bluff Planned Unit Development and consists of +/- 52.8 acres identified by tax map numbers R614 057 000 0001 0000 and R614 058 000 0001 0000, located east of the intersection of Old Anson Road and Bighouse Plantation Road, and includes Long Island and the adjacent causeway.  
STATUS 11/9/23: Staff comments on the preliminary development plan application were heard at the November 8, 2023, meeting of the DRC. Awaiting final development plan submittal.

**PROJECT NAME:** Palmetto Bluff

DP-03-24-019033	03/08/2024	224 MORELAND ROAD	Development Plan	Active	Dan Frazier
-----------------	------------	-------------------	------------------	--------	-------------

**Applicant:** Thomas & Hutton - USE THIS ACCOUNT

**Owner:** Palmetto Bluff Uplands, LLC / May River Forest, LLC

**PLAN DESCRIPTION:** A request by Drew Lonker of Thomas & Hutton, on behalf of May River Forest, LLC, for approval of a preliminary development plan application. The project consists of creating 26 single family lots with associate infrastructure. The property is identified by tax map numbers R614-045-000-0024-0000, R614-046-000-0062-0000, R614-052-000-0059-0000, R614-057-000-0001 -0000, R614-057-000-0002-0000 and consists of 48.9 acres located along Old Moreland Road within the Palmetto Bluff PUD. Status: Staff comments on the Preliminary Plan were heard at the April 17, 2024 meeting of the DRC. Awaiting final submittal.

**PROJECT NAME:**





# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment  
Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Development Plan

DP-02-23-017662	02/09/2023	1215 MAY RIVER ROAD	Development Plan	Active	Dan Frazier
-----------------	------------	---------------------	------------------	--------	-------------

**Applicant:** Ward Edwards, Inc. - USE THIS ACCOUNT **Owner:** ERB Enterprises, LLC

**PLAN DESCRIPTION:** A request by Anna Petitgout of Ward Edwards Engineering on behalf of Ed Goeas of ERB Enterprises LLC for approval of a preliminary development plan application. The applicant proposes to construct site infrastructure, including an internal streetscape, drives, parking, walks, utilities, drainage, and stormwater to serve four mixed-use lots, one commercial lot and four residential lots. The subject property contains three lots zoned Neighborhood General – HD (NG-HD), one lot zoned Neighborhood Core (NC), and two lots zoned Residential General (RG) and consists of 3.43 acres identified by tax map numbers R610 039 000 0114 0000, R610 039 000 0093 0000, R610 039 000 0094 0000, R610 039 000 0095 0000, R610 039 000 0096 0000, R610 039 000 0107 0000 located at 1203 – 1217 May River Road and 15 - 19 Jason Street,  
STATUS: Comments on the preliminary development plan were reviewed at the June 14, 2023, meeting of the DRC.  
STATUS: The preliminary development plan was approved at the September 27, 2023, Planning Commission meeting. Awaiting final development plan submittal.  
STATUS: The final development plan was heard at the July 10, 2024 meeting of the DRC.  
STATUS: A final development plan resubmittal was received on 9/10/24.

**PROJECT NAME:** VAUX PROPERTY

DP-09-23-018499	09/21/2023	26 BRUIN RD ROAD	Development Plan	Active	Dan Frazier
-----------------	------------	------------------	------------------	--------	-------------

**Applicant:** Maria Drawdy **Owner:** Alljoy DC, LLC

**PLAN DESCRIPTION:** A request by Maria Drawdy on behalf of Troy Derda for approval of a preliminary land development application. The project consists of a two story building with a donut shop on the first floor and a residential unit on the second floor, associated parking and infrastructure. The property is identified by tax map number R610 039 00A 0416 0000 and consists of .21 acres located at 26 Bruin Road in the Neighborhood General Historic District.  
STATUS: Comments on the preliminary development plan were heard at the October 25, 2023 DRC Meeting.  
STATUS: The preliminary development plan was resubmitted on 11/20/23.  
STATUS: The Preliminary Development Plan was approved at the 12/20/23 Planning Commission Meeting. Awaiting final development plan submittal.

**PROJECT NAME:** OLD TOWN



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Development Plan

DP-10-24-019406	10/16/2024		Development Plan	Active	Dan Frazier
-----------------	------------	--	------------------	--------	-------------

**Applicant:** William Heintz

**Owner:** Rolling Dough Properties LLC

**PLAN DESCRIPTION:** A request by William Heintz of Kimley-Horn, on behalf of Rolling Dough Properties, LLC, for approval of a Preliminary Development Plan. The project consists of a 4,400 SF quick service restaurant with associated parking and infrastructure. The property is zoned Buckwalter PUD and consists of approximately 1.52 acres identified by tax map number R610 030 000 2002 000 and located at the southeast corner of Buckwalter Place Blvd and Innovation Drive within the Buckwalter Place Master Plan.  
STATUS: This application was heard at the November 20, 2024 Development Review Committee meeting.  
STATUS: This request will be heard at the January 22, 2025, Planning Commission meeting.

**PROJECT NAME:** Buckwalter

DP-01-23-017616	01/27/2023	17 BUCKHEAD BAY ROAD	Development Plan	Active	Dan Frazier
-----------------	------------	----------------------	------------------	--------	-------------

**Applicant:** Thomas & Hutton - USE THIS ACCOUNT

**Owner:**

**PLAN DESCRIPTION:** A request by John Paul Moore of Thomas & Hutton, on behalf of the property owner Citadel Bluffton, LLC for approval of a preliminary development plan. The project consists of the construction of one (1) 40,750 S.F. first floor and 30,000 S.F. second floor building consisting of storage units and 30 covered parking spaces. The property is zoned Palmetto Bluff Planned Unit Development and consists of +/- 3.2 acres identified by tax map number R614 046 000 0643 0000 located within the Palmetto Bluff Tract Master Plan.

Status: The preliminary development plan application was heard at the March 1, 2023 DRC meeting.

Status: Comments on the final development plan application were heard at the November 15, 2023, DRC meeting. Awaiting re-submittal.

STATUS: Additional comments were heard at the March 25, 2024 Development Review Committee meeting. Awaiting resubmittal.

**PROJECT NAME:**



# Growth Management Application Update Report

Town of Bluffton

Department of Growth Management

Office of Planning and Community Development

20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Development Plan

DP-05-23-018081 05/23/2023 Development Plan Active Dan Frazier

**Applicant:** Sturre Design & Development, LLC

**Owner:**

**PLAN DESCRIPTION:** A request by Jen Townsley of Palmetto Coastal Landscaping, on behalf of Hampton Lake Community Association, Inc., for the approval of a preliminary Development Plan. The project proposes to construct an enclosed storage area including a gravel storage yard, gravel access drive, stormwater BMP, and water service to utilize as vehicle and equipment storage for landscaping operations. The property is zoned Buckwalter PUD and consists of approximately 10.9 acres, identified by tax map number R614-029-000-1985-0000 located on Parklands Drive within the Brightwater Master Plan.

STATUS: Staff comments were heard at the June 28, 2023, meeting of the DRC. Awaiting re-submittal.

STATUS: The preliminary development plan was resubmitted on 11/22/23.

STATUS: The Preliminary Development Plan was approved at the 12/20/23 Planning Commission Meeting. Awaiting final development plan submittal.

#### PROJECT NAME:

DP-08-22-017074 08/12/2022 Development Plan Active Dan Frazier

**Applicant:** Thomas & Hutton

**Owner:**

**PLAN DESCRIPTION:** A request by Michael Hughes of Thomas & Hutton on behalf of May River Forest, LLC for approval of a development plan. The project consists of the general clearing, installation of utilities, drainage, grading and paving for +/- 5 miles of Old Anson Road beginning near the intersection of Old Moreland Road and Big House Landing Road and terminating on Big House Island near the Anson Marina. The property is zoned Palmetto Bluff PUD and consists of approximately 110.0 acres identified by tax map numbers R614 046 000 0062 0000, R614 052 000 0059 0000, R614 045 000 0024 0000, R614 045 000 0026 0000, and R614 057 000 0001 0000 located within the Palmetto Bluff Master Plan.

STATUS: Staff comments were reviewed at the September 14, 2022 meeting of the DRC.

STATUS: The final development plan application was submitted on May 19, 2023. Comments on the FDP submittal were reviewed at the June 21, 2023, meeting of the DRC. Awaiting re-submittal addressing FDP Staff Comments.

#### PROJECT NAME:



# Growth Management Application Update Report

Attachment

Section XI. Item #1.

Town of Bluffton

Department of Growth Management

Office of Planning and Community Development

20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Development Plan					
DP-06-24-019202	06/27/2024		Development Plan	Active	Dan Frazier
Applicant: Thomas & Hutton - USE THIS ACCOUNT		Owner: Pulte Group			
<p><b>PLAN DESCRIPTION:</b> A request by Sam Bellock of Pulte Home Company for approval of a Preliminary Development Plan for Phase 4 of Midpoint at New Riverside. The project consists of 90 single family lots, open space and associated infrastructure. The property is zoned New Riverside Planned Unit Development and consists of approximately 32.0 acres identified by tax map number R610 044 000 0012 0000 located within the Midpoint at New Riverside Initial Master Plan.</p> <p>STATUS: Comments on the Preliminary Development Plan were reviewed at the July 31, 2024, meeting of the DRC. Awaiting Final DP submittal.</p>					
PROJECT NAME:		MIDPOINT AT NEW RIVERSIDE			
DP-10-22-017341	10/21/2022	110 PALMETTO BLUFF ROAD	Development Plan	Active	Dan Frazier
Applicant: Thomas & Hutton		Owner: Cleland Site Prep			
<p><b>PLAN DESCRIPTION:</b> A request by John Paul Moore of Thomas &amp; Hutton on behalf of Pritchard Farm, LLC for approval of a development plan. The project consists of 10 single family residential lots, open space, and associated infrastructure. The property is zoned New Riverside Planned Unit Development and consists of approximately 38 acres identified by tax map numbers R610 044 000 0136 0000, R610 044 000 0141 0000, R600 045 000 0001 0000, R610 044 000 0002 0000, R614 045 000 0052 0000, R614 045 000 0578 0000 and R600 045 000 0012 0000 located within Parcel 9 of the New Riverside Concept Master Plan.</p> <p>STATUS UPDATE: Staff comments on the preliminary development plan were heard at the November 30, 2022 meeting of the DRC.</p> <p>STATUS: The final development plan application was heard at the May 1, 2024, meeting of the DRC.</p> <p>STATUS: The project is awaiting NPDES approval.</p>					
PROJECT NAME:					
DP-09-24-019346	09/18/2024		Development Plan	Active	Dan Frazier
Applicant: Thomas & Hutton - USE THIS ACCOUNT		Owner: Pulte Group			
<p><b>PLAN DESCRIPTION:</b> A request by John Paul Moore of Thomas and Hutton on behalf of Sam Bellock of Pulte Home Company for approval of a Preliminary Development Plan. The project consists of 70 single family residential lots, open space, and associated infrastructure. The property is zoned New Riverside Planned Unit Development and consists of approximately 26.0 acres identified by tax map number R610 044 000 0012 0000 located within the Midpoint of New Riverside Concept Master Plan.</p> <p>STATUS: This item was heard at the October 23, 2024 Development Review Committee meeting. Awaiting final development plan submittal.</p>					
PROJECT NAME:		MIDPOINT AT NEW RIVERSIDE			



# Growth Management Application Update Report

Town of Bluffton

Department of Growth Management

Office of Planning and Community Development

20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Development Plan

DP-08-24-019315 08/30/2024 Development Plan Active Dan Frazier

**Applicant:** Pulte Group

**Owner:**

**PLAN DESCRIPTION:** A request by Sam Bellock of Pulte Home Company for the approval of a Preliminary Development Plan. The project consists of an amenity center, swimming pool, playground, pickle ball courts, and associated site infrastructure. The property is zoned New Riverside PUD and consists of approximately 3.1 acres identified by tax map number R610 044 000 0012 0000 and located at Mint Meadows and Sea Glass Lane within the Midpoint at New Riverside Master Plan.

STATUS: This item was heard at the October 9, 2024 Development Review Committee Meeting.

**PROJECT NAME:** MIDPOINT AT NEW RIVERSIDE

DP-05-24-019117 05/03/2024 4E INNOVATION DRIVE Development Plan Active Dan Frazier

**Applicant:** Ryan Lyle

**Owner:** PARCEL 6 LLC %TOM ZINN

**PLAN DESCRIPTION:** 10 INNOVATION DRIVE - UPDATE ADDRESS

A request by South of Broad Healthcare for review of a preliminary development plan. The project consists of a 91,000 SF hospital and associated infrastructure. The property is zoned Buckwalter Planned Unit Development and consists of approximately 12.52 acres identified by tax map numbers R610 030 000 1705 0000, R610 030 000 1845 0000 and R610 030 000 1846 0000 located within the South of Broad Master Plan at the northwest corner of the Bluffton Parkway and Buckwalter Parkway Intersection, east of Innovation Drive.

STATUS: The Application was heard at the June 12, 2024 DRC meeting.

STATUS: The Applicant provided a re-submittal on June 26, 2024.

STATUS: This preliminary development plan was APPROVED WITH CONDITIONS at the July 24, 2024 Planning Commission meeting. Awaiting stormwater permit and Final DP submittal.

**PROJECT NAME:**



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Development Plan

DP-12-23-018802	12/27/2023	21 MAIDEN LANE	Development Plan	Active	Dan Frazier
-----------------	------------	----------------	------------------	--------	-------------

**Applicant:** Sturre Design & Development, LLC

**Owner:**

**PLAN DESCRIPTION:** A request by Nathan Sturre of Sturre Engineering on behalf of the property owner Hinton Vacation Properties, LLC, for approval of a preliminary development plan application. The project proposes the development of a thirteen (13) lot mixed-use subdivision containing eleven (11) single-family residential lots, two (2) mixed-use lots, common open space, and associated infrastructure. The properties are zoned Neighborhood General – Historic District (NG-HD) and consist of 3.58 acres identified by tax map numbers R610 039 00A 0042 0000 and R610 039 00A 042A 0000 located on the south side of May River Road west of Pritchard Street.

STATUS: Comments on the preliminary development plan were reviewed at the January 31, 2024, meeting of the DRC.

STATUS: The preliminary development plan was re-submitted on February 26, 2024. STATUS 02/28/24: The Applicant requested to withdraw the application as submitted and may provide a re-submittal in the future.

STATUS: Comments on the preliminary development plan resubmittal was reviewed at the May 1, 2024, meeting of the DRC. The Application was placed on the 5/22 Agenda for the Planning Commission. The Applicant withdrew the application from the agenda during the discussion to address PC Concerns.

Awaiting resubmittal for Planning Commission

STATUS: Pre-app held for new design 09/05/2024. Awaiting submittal for preliminary.

**PROJECT NAME:** OLD TOWN

DP-04-22-016574	04/07/2022	58 CALHOUN ST	Development Plan	Active	Dan Frazier
-----------------	------------	---------------	------------------	--------	-------------

**Applicant:** Ward Edwards, Inc. - USE THIS ACCOUNT

**Owner:** May River Montessori

**PLAN DESCRIPTION:** A request by Conor Blaney of Ward Edwards Engineering, on behalf of May River Montessori, Inc., for approval of a preliminary development plan. The project consists of the construction of a new classroom building adjacent to the existing May River Montessori facility. The property is zoned Neighborhood Center Historic District (NCE-HD) and consists of approximately 0.65 acres identified by tax map number R610 039 00A 0123 0000 located at 58 Calhoun Street.

STATUS: Development plan comments were reviewed at the 5/11/22 meeting of the DRC.

STATUS: At the June 22, 2022, Planning Commission meeting, the applicant requested "withdrawal of the application to provide additional information".

STATUS: The Applicant resubmitted on July 28, 2022.

STATUS: The preliminary development plan was approved with conditions at the September 28, 2022, Planning Commission meeting.

STATUS: Staff comments on the final development plan were heard at the February 1, 2023 meeting of the DRC. Awaiting resubmittal.

STATUS: Project is still active as of July 5, 2023. The applicant would like to obtain the Town's site development permit once the state land disturbance permit is obtained.

**PROJECT NAME:** OLD TOWN





# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Development Plan

DP-10-24-019391	10/10/2024		Development Plan	Active	Dan Frazier
-----------------	------------	--	------------------	--------	-------------

**Applicant:** Ward Edwards, Inc. - USE THIS ACCOUNT

**Owner:** Eric Zwilsky

**PLAN DESCRIPTION:** A request by Brad Buss of Ward Edwards Inc., on behalf of Eric Zwilsky of 1 Corinthians, LLC, for approval of a Preliminary Development Plan. The project consists of a 15,400 SF basketball-focused fitness facility with associated access, parking, utilities and stormwater infrastructure. The property is zoned General Mixed Use (GMU) and consists of approximately 6.0 acres identified by tax map numbers R610 031 000 0212 0000 and R610 031 000 0173 0000.

STATUS: This item was heard at the November 13, 2024 Development Review Committee meeting.

STATUS: This request has been added to the December 18, 2024 Planning Commission agenda.

**PROJECT NAME:** WESTBURY PARK COMMERCIAL

DP-10-24-019407	10/18/2024	45 CAMP EIGHT ROAD	Development Plan	Active	Dan Frazier
-----------------	------------	--------------------	------------------	--------	-------------

**Applicant:** Thomas & Hutton - USE THIS ACCOUNT

**Owner:** Palmetto Bluff Uplands, LLC / May River Forest, LLC

**PLAN DESCRIPTION:** Palmetto Bluff is continuing development with the Commissary Campus. The project is located within the Palmetto Bluff PUD at the southwestern corner of the Old Moreland Road and Laurel Oak Bay Road intersection, north of The Farm. The project area includes parcels R614-045-000-0026-0000 and R614-046-000-0062-0000. The total project area is +/- 38.4 acres. The Project scope shall consist of general clearing, grading, water, storm, and sewer infrastructure, and parking areas to serve the commissary kitchen building, storage structure, and future development within the project area.

**PROJECT NAME:** PALMETTO BLUFF PHASE 1



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Development Plan					
DP-09-22-017188	09/13/2022		Development Plan	Active	Dan Frazier
Applicant: Witmer Jones Keefer Ltd.		Owner:			
<p><b>PLAN DESCRIPTION:</b> A request by Carey Levow of Crowne at Buck Island, Limited Partnership on behalf of the property owner, Buck Island Partners, LLC for approval of a preliminary development plan application. The project consists of an apartment complex containing 4 proposed 4 story multi-family buildings and associated open space, amenities, parking, and stormwater management. The property is zoned Light Industrial and consists of approximately 10.11 acres identified by tax map number R610 039 000 0180 0000 located at 412 Buck Island Road.</p> <p>STATUS: Staff comments on the preliminary development plan were reviewed at the October 19, 2022 meeting of the DRC.</p> <p>STATUS: The Applicant resubmitted on November 14, 2022.</p> <p>STATUS: The Preliminary Development Plan was approved at the December 14, 2022, Planning Commission. Awaiting Final Development Plan submittal,</p>					
PROJECT NAME:		BUCK ISLAND/SIMMONSVILLE			
DP-03-24-019066	03/26/2024	9 BRUIN ROAD	Development Plan	Active	Dan Frazier
Applicant: Witmer Jones Keefer Ltd.		Owner: Eugene Marks			
<p><b>PLAN DESCRIPTION:</b> A request by Jonathan Marsh of Witmer Jones Keefer, Ltd, on behalf of the property owner, Eugene Marks of JOHA LLC, for approval of a preliminary development plan. The project proposes the installation of site infrastructure including internal drive, access, parking, walks, utilities, drainage, and stormwater infrastructure to support one existing residential unit and the future development of three mixed-use commercial lots and two mixed-use carriage houses for a combined total square footage of +/- 19,100 SF. The property is zoned Neighborhood Commercial – Historic District (NC-HD) and consists of approximately 0.79 acres identified by tax map number R610 039 00A 0021 0000 located at the northeast corner of Bluffton Road and Bruin Road.</p> <p>Status: Staff comments on the preliminary development plan was heard at the May 1, 2024, meeting of the DRC.</p> <p>Status: The preliminary development plan application was approved at the June 26, 2024 Planning Commission agenda. Awaiting final development plan submittal.</p>					
PROJECT NAME:		OLD TOWN			



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Development Plan

DP-03-24-019021	03/01/2024	700 BUCKWALTER TOWNE BOULEVARD	Development Plan	Active	Dan Frazier
-----------------	------------	--------------------------------	------------------	--------	-------------

**Applicant:** Cranston, LLC **Owner:** TKC CCCLC, LLC

**PLAN DESCRIPTION:** A request by Cranston, LLC on behalf of TKC CCCLV, LLC for approval of a preliminary development plan application. The project consists of a three-story, 54,000 square foot medical office building with associated parking and infrastructure. The property is identified by tax map number R610 030 000 1854 0000 and consists of 4.76 acres located at 700 Buckwalter Towne Boulevard in the Buckwalter PUD.

STATUS: This item was heard at the 4/3/24, meeting of the DRC.

STATUS: The preliminary development plan was resubmitted on 4/24/24.

STATUS: The Preliminary Development Plan was heard at the 5/22/24 Planning Commission Meeting and was approved. Awaiting stormwater permit then final development plan submittal.

STATUS 8/29/24: The Traffic Impact Analysis was modified and resubmitted. No changes to recommendations. Still awaiting stormwater permit and final DP submittal.

STATUS 12/10/24 The final development plan submittal will be reviewed at the December 18, 2024 DRC meeting.

#### PROJECT NAME:

DP-04-24-019111	04/30/2024	9220 EVAN WAY	Development Plan	Active	Dan Frazier
-----------------	------------	---------------	------------------	--------	-------------

**Applicant:** Breck Delaney **Owner:** CVS 75651 SC LLC

**PLAN DESCRIPTION:** A request by Shelbi D'Avignon on behalf of the property owner CVS 75651 SC LLC for review of a preliminary development plan. The project consists of an 11,286 SF retail, clinic and pharmacy with drive through, and associated infrastructure. The property is zoned Jones Estate Planned Unit Development and consists of approximately 1.911 acres identified by tax map number R610 036 000 0979 0000 located within the May River Crossing Master Plan.

STATUS: The preliminary development plan was reviewed at the June 5, 2024 DRC meeting.

STATUS: A Preliminary Development Plan resubmittal was provided on July 17, 2024.

STATUS: The Preliminary Development Plan will be considered at the 8/28/24 Planning Commission Meeting.

STATUS 8/29/24: The Preliminary Development Plan was APPROVED. Awaiting stormwater permit and final DP submittal.

#### PROJECT NAME:



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Development Plan

DP-06-24-019190	06/18/2024	4 PARKSIDE DRIVE	Development Plan	Active	Dan Frazier
-----------------	------------	------------------	------------------	--------	-------------

**Applicant:** Joel Taylor **Owner:** Parcel C5 LLC

**PLAN DESCRIPTION:** A request by Joel C. Taylor of Tenet Healthcare, on behalf of Parcel C5 LLC, for approval of a Preliminary Development Plan. The project consists of a free-standing emergency department and medical offices in a single building to include approximately 50,250 SF. Proposed drives, parking, landscaping, utilities and supporting infrastructure. The property is zoned Buckwalter PUD and consists of approximately 10.9 acres identified by tax map numbers R610 022 000 1073 0000, R610 022 000 1081 0000, R610 022 000 1082 0000, R610 022 000 1084 0000 and located on the southeast corner of Buckwalter Parkway and Parkside Drive within the Buckwalter Commons. Status: The preliminary development plan application was heard at the July 24, 2024 meeting of the Development Review Committee. The application was resubmitted on July 31, 2024.

STATUS: The Preliminary Development Plan was approved at the 8/28/24 Planning Commission Meeting. Awaiting Final DP submittal.

#### PROJECT NAME:

DP-06-24-019163	06/06/2024	87 SIMMONSVILLE ROAD	Development Plan	Active	Dan Frazier
-----------------	------------	----------------------	------------------	--------	-------------

**Applicant:** Carolina Engineering Consultants, Inc. **Owner:** One Bluff Park LLC

**PLAN DESCRIPTION:** A request by David Karlyk, PE of Carolina Engineering, on behalf of One Bluff Park for approval of a Preliminary Development Plan. The project consists of constructing a 4,265 sq. ft. automated car wash with associated parking and infrastructure. The property is zoned Shultz PUD and consists of approximately 1.49 acres identified by tax map number R610 031 000 1691 0000 and located at the northeast corner of Bluffton Parkway and Simmonsville Road within the Bluffton Park Master Plan.

STATUS: The preliminary development plan was heard at the Development Review Committee meeting on July 17, 2024. A resubmittal was provided on July 22, 2024.

STATUS: The Preliminary Development Plan was approved at the 8/28/24 Planning Commission Meeting. Awaiting final DP submittal.

**PROJECT NAME:** BUCK ISLAND/SIMMONSVILLE



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Development Plan					
DP-03-23-017728	03/03/2023	62 OLD PALMETTO BLUFF RD	Development Plan	Active	Dan Frazier
Applicant: Thomas & Hutton - USE THIS ACCOUNT		Owner: Cleland Site Prep			
<p><b>PLAN DESCRIPTION:</b> A request by John Paul Moore of Thomas &amp; Hutton on behalf of Pritchard Farm, LLC for approval of a preliminary development plan. The project consists of 144 single family residential lots, open space, and associated infrastructure. The property is zoned New Riverside Planned Unit Development and consists of approximately 48.9 acres identified by tax map numbers R610 044 000 0143 0000 and R610 044 000 0002 0000 located within Parcel 9 of the New Riverside Concept Master Plan.</p> <p>STATUS: Staff comments on the Preliminary Development Plan were reviewed at the April 12, 2023, meeting of the DRC. Awaiting resubmittal.</p> <p>STATUS: The applicant submitted Final Development Plans on October 23, 2023.</p> <p>STATUS: Staff comments on the Final Development Plan will be heard at the November 29, 2023 meeting of the DRC.</p> <p>STATUS 12/4/23: The final development plan is APPROVED.</p> <p>STATUS 7/3/24: A Development Plan Amendment (re-phasing of Phase 5) was reviewed at the July 10, 2024, meeting of the DRC.</p> <p>STATUS 8/29/24: Awaiting resubmittal.</p>					
PROJECT NAME:		NEW RIVERSIDE -PARCEL 9			
DP-06-22-016804	06/01/2022	6201 JENNIFER CT	Development Plan	Active	Dan Frazier
Applicant: Witmer-Jones-Keefer, Ltd.		Owner: Michael Bradley Holdings, LLC			
<p><b>PLAN DESCRIPTION:</b> A request by Witmer Jones Keefer, Ltd for approval of a preliminary development plan application. The project proposes the construction of a ±50,000 SF two-story building that includes a +/-20,000 square foot production brewery, and a +/-30,000 square foot space allocated to restaurant tenants, retail tenants, business offices, and a tasting room. The property is zoned Neighborhood Core (NC), identified by tax map numbers R610 039 000 0021 0000, R610 039 000 0756 0000, and R610 039 000 0757 0000 and located on three existing lots on Jennifer Court at the intersection of Buck Island Road and May River Road.</p> <p>STATUS UPDATE: Staff comments were heard at the July 6 meeting of the DRC.</p> <p>STATUS UPDATE: The application was approved with conditions at the August 24, 2022, Planning Commission meeting.</p> <p>STATUS UPDATE: Staff comments on the final development plan were heard at the November 30, 2022 meeting of the DRC.</p> <p>STATUS UPDATE: Final development plans were resubmitted on December 7, 2023.</p> <p>STATUS UPDATE: Staff provided the applicant with comments on the final development plan re-submittal on December 22, 2023.</p> <p>STATUS: Awaiting resubmittal.</p>					
PROJECT NAME:		BUCK ISLAND/SIMMONSVILLE			



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Development Plan

DP-03-24-019067	03/26/2024	2800 MAY RIVER CROSSING	Development Plan	Active	Dan Frazier
-----------------	------------	-------------------------	------------------	--------	-------------

**Applicant:** Ryan Lyle

**Owner:** First Chatham Bank

**PLAN DESCRIPTION:** A request by Ryan Lyle of Davis & Floyd, Inc on behalf of Russell Baxley of Beaufort Memorial Hospital for approval of a preliminary development plan. The project consists of the construction of a 5,000 SF medical office building with associated parking and pedestrian access. The property is zoned Jones Estate Planned Unit Development and consists of approximately 1.37 acres identified by tax map number R610 036 000 3212 0000 and located within the May River Crossing Master Plan.  
Status: Staff comments on the preliminary development plan were heard at the May 1, 2024, meeting of the DRC. Resubmittal was made 5/14/24 for June 26, 2024 Planning Commission consideration.  
Status: The preliminary development plan application was conditionally approved at the June 26, 2024 Planning Commission meeting. Awaiting final development plan submittal.

**PROJECT NAME:** May River Crossing

DP-08-23-018338	08/01/2023	1 JCS COVE	Development Plan	Active	Dan Frazier
-----------------	------------	------------	------------------	--------	-------------

**Applicant:** Sturre Design & Development, LLC

**Owner:** James Saba

**PLAN DESCRIPTION:** A request by Nathan Sturre of Sturre Engineering on behalf of the property owner James Saba, for approval of a preliminary development plan application. The project proposes the construction of a 2,786 SF recreation building to serve the six (6) single family residences at JC's Cove. The property is zoned Agriculture (AG) and consists of 1.53 acres identified by tax map number R610 039 000 1129 0000 located on the south side of May River Road approximately 1,200 feet east of Buck Island Road.  
STATUS: Staff comments on the preliminary development plan was reviewed at the September 6, 2023 meeting of the DRC.  
STATUS: The preliminary development plan was heard at the September 27, 2023, Planning Commission meeting. Conceptual COFA was heard at the 2/21/24 DRC meeting. Awaiting final development plan submittal.

**PROJECT NAME:** JC'S COVE





# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Development Plan

DP-09-24-019351	09/19/2024	45 CAMP EIGHT ROAD	Development Plan	Active	Dan Frazier
-----------------	------------	--------------------	------------------	--------	-------------

**Applicant:** Thomas & Hutton - USE THIS ACCOUNT **Owner:** Palmetto Bluff Uplands, LLC / May River Forest, LLC

**PLAN DESCRIPTION:** A request by Drew Lonker of Thomas and Hutton on behalf of May River Forest, LLC for approval of a Preliminary Development Plan. The project consists of 59 single family residential lots and associated infrastructure. The property is zoned Palmetto Bluff Planned Unit Development and consists of approximately 80.1 acres identified by tax map number R614 045 000 0026 0000, R610 045 000 0576 0000, R614 046 000 0062 0000, R614 046 000 0401 0000 located at the intersection of Old Moreland Road and Laurel Oak Bay Road within the Palmetto Bluff Tract Master Plan.

STATUS: This item was heard at the October 23, 2024 Development Review Committee Meeting. Awaiting final development plan submittal.

**PROJECT NAME:** PALMETTO BLUFF PHASE 1

DP-01-23-017584	01/23/2023	213W HERITAGE PARKWAY	Development Plan	Active	Dan Frazier
-----------------	------------	-----------------------	------------------	--------	-------------

**Applicant:** Thomas & Hutton - USE THIS ACCOUNT **Owner:**

**PLAN DESCRIPTION:** A request by Tyler Vaughn of Thomas & Hutton, on behalf of LSSD New Riverside, LLC, for approval of a preliminary development plan application. The project consists of 40 single-family residential lots with associated infrastructure. The property is identified by tax map numbers R614 035 000 1362 0000 and R614 035 000 1318 0000 and consists of 11.3 acres within Heritage at New Riverside. The property is zoned New Riverside Planned Unit Development.

Status: This item was heard at the March 1, 2023 DRC meeting. Awaiting resubmittal.

**PROJECT NAME:**

DP-07-24-019259	07/30/2024	1W WHITEHOUSE PLANTATION ROAD	Development Plan	Active	Dan Frazier
-----------------	------------	-------------------------------	------------------	--------	-------------

**Applicant:** Thomas & Hutton - USE THIS ACCOUNT **Owner:** Will Howard

**PLAN DESCRIPTION:** A request by Drew Lonker of Thomas & Hutton, on behalf of Palmetto Bluff Uplands, LLC for approval of a Preliminary Development Plan. The project scope consists of general clearing, installation of water and sewer utilities, a sanitary sewer pump station, dry utilities, storm drainage infrastructure and a asphalt roadway to serve the proposed 12 single-family residential lots. The property consists of approximately 27.35 acres identified by tax map numbers R614 045 000 0024 0000 and R614 046 000 0062 0000 and located within the Palmetto Bluff PUD.

STATUS: This item was heard at the September 4, 2024 Development Review Committee meeting. Awaiting resubmittal.

**PROJECT NAME:**



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Development Plan					
Public Project					
DP-12-23-018739	12/05/2023	3829 OKATIE HWY HIGHWAY	Development Plan	Active	Dan Frazier
Applicant: Town of Bluffton		Owner: Town of Bluffton			
<p><b>PLAN DESCRIPTION:</b> A request by Constance Clarkson on behalf of the Town of Bluffton for approval of a public project. The project consists of surface improvements to the New River Linear Trail, construction of a pier at the southern trail terminus and restroom facilities at the trailhead parking lot. The properties are zoned Jones Estate Planned Unit Development and New Riverside Planned Unit Development and consists of approximately 42.7 acres identified by tax map numbers R610 028 000 0018 0000, R610 035 000 0016 0000 and R614 035 000 0011 0000, and located within the Cypress Ridge Master Plan and Heritage at New Riverside Master Plan.</p> <p>STATUS: Comments for the public project were reviewed at the January 3, 2024, meeting of the DRC. Awaiting resubmittal.</p> <p>STATUS 03/15/24: The project manager is negotiating an easement agreement with Central Electric and Santee Cooper.</p> <p>STATUS 08/28/24: Awaiting easement agreement. Projected end of September.</p>					
PROJECT NAME:					
DP-10-24-019422	10/30/2024	72 BRIDGE ST STREET	Development Plan	Active	Dan Frazier
Applicant: Kathleen Duncan		Owner: Town of Bluffton			
<p><b>PLAN DESCRIPTION:</b> A request by Kathleen Duncan of J.K. Tiller Associates, on behalf of the Town of Bluffton, for the approval of a Public Project. The project proposes the redevelopment of the Sarah Riley Hooks Cottage. The property is identified by tax map numbers R610 039 00A 159B 0000, R610 039 00A 159A 0000, and R610 039 00A 0159 0000, consists of 0.948 acres and is located at 76 Bridge Street in the Neighborhood General Historic District.</p> <p>STATUS: This item will be heard at the November 27, 2024 Development Review Committee meeting.</p>					
PROJECT NAME: OLD TOWN					
DP-11-24-019435	11/04/2024	74 BRIDGE ST STREET	Development Plan	Active	Dan Frazier
Applicant: Town of Bluffton		Owner: Town of Bluffton			
<p><b>PLAN DESCRIPTION:</b> A request by Constance Clarkson on behalf of the Town of Bluffton for the approval of a Public Project application. The project consists of roadway, sidewalk, parking and drainage improvements in the Bridge Street right-of-way in Old Town Bluffton.</p> <p>STATUS: This item will be heard at the December 18, 2024 Development Review Committee meeting.</p>					
PROJECT NAME: OLD TOWN					



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Development Plan					
DP-10-23-018587	10/19/2023	800 BUCKWALTER PARKWAY	Development Plan	Active	Dan Frazier
Applicant: Wood and Partners, Inc.		Owner: Town of Bluffton			
PLAN DESCRIPTION: A request by Eric Walsnovich of Wood + Partners, Inc, on behalf of the property owner, Town of Bluffton, for approval of a public project. The project proposes the construction of four new soccer fields; a new restroom building; renovations to the existing restroom building; new parking areas, driveways and sidewalks; storm water management facilities; associated utilities; lighting; site furnishings and landscaping. The property is zoned Buckwalter Planned Unit Development and consists of approximately 142.9 acres identified by tax map number R610 038 000 0053 0000 located within the Buckwalter Recreation Center Master Plan. Status: Comments on the public project were reviewed at the November 15, 2023, meeting of the DRC. Status 4/15/24: The applicant has submitted for Stormwater Permit and it is currently under review.					
PROJECT NAME:					
DP-08-24-019296	08/20/2024	22 WATER ST STREET	Development Plan	Active	Dan Frazier
Applicant: Town of Bluffton		Owner: Town of Bluffton			
PLAN DESCRIPTION: A request by Charles Savino on behalf of the Town of Bluffton for approval of a Public Project. The project consists of the installation of sewer mains and sewer lateral for parcels within the Old Town Bluffton Historic District. The project also includes connection of a dwelling to the sewer main. The work areas are located in the ROW of Water Street, Green Street, Lawrence Street, and will include encroachments into Boundary Street. STATUS: This item was heard at the September 18, 2024 Development Review Committee Meeting. Awaiting resubmittal.					
PROJECT NAME: OLD TOWN					
DP-11-24-019429	11/04/2024		Development Plan	Active	Dan Frazier
Applicant: Town of Bluffton		Owner: Town of Bluffton			
PLAN DESCRIPTION: A request by Constance Clarkson on behalf of the Town of Bluffton for the approval of a Public Project application. The project consists of improvements of the Buckwalter Place Park to include amenity updates, paving, lighting, and landscaping. STATUS: This item will be heard at the December 18, 2024 Development Review Committee meeting.					
PROJECT NAME: Buckwalter					

Total Development Plan Cases: 36



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Development Plan Amendment					
NA					
DPA-10-24-019420	10/29/2024	400 BUCKWALTER PLACE BOULEVARD	Development Plan Amendment	Active	Dan Frazier
<b>Applicant:</b> Ward Edwards, Inc. - USE THIS ACCOUNT <b>Owner:</b> Core Buckwalter Place LLC					
<b>PLAN DESCRIPTION:</b> A request by Ryan Lee of Novant Health, on behalf of Blake McRae of Core Buckwalter, LLC for approval of a Development Plan Amendment. The project consists of the renovation of an existing healthcare building to support ambulatory servicing center and office. The property is zoned Buckwalter PUD and consists of approximately 4.77 acres identified by tax map number R610 030 000 1849 0000 and located on the corner of Buckwalter Place Boulevard and Innovation Drive within the Buckwalter Place Master Plan. STATUS: This item will be heard at the December 4, 2024 Development Review Committee meeting.					
<b>PROJECT NAME:</b> BUCKWALTER PLACE					
DPA-11-24-019439	11/06/2024	5 LAWTON ST STREET	Development Plan Amendment	Active	Dan Frazier
<b>Applicant:</b> Maria Drawdy <b>Owner:</b> James Jeffcoat					
<b>PLAN DESCRIPTION:</b> A request by Maria Drawdy on behalf of James and Michele Jeffcoat Revocable Trust for approval of a Development Plan Amendment. The project consists of the demolition of the existing storage shed and construction of an accessory dwelling unit with associated parking, landscaping, and infrastructure. The property is zoned Neighborhood Center - Historic District identified by tax map number R610 039 00A 0093 0000. STATUS: This Development Plan Amendment application was heard at the November 13, 2024, meeting of the DRC. STATUS: A DPA Resubmittal was received on November 21, 2024.					
<b>PROJECT NAME:</b> OLD TOWN					



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Development Plan Amendment

DPA-09-22-017226      09/23/2022      Development Plan Amendment      Active      Dan Frazier

**Applicant:** Tabby Road HOA

**Owner:** Tabby Road HOA

**PLAN DESCRIPTION:** A request by Tabby Roads HOA for approval of a development plan amendment application. The project consists of closing the Tabby Shell Road entrance from Burnt Church Road. The property is identified by tax map number R610 039 000 1235 0000 and is zoned Neighborhood General -HD.

Status: This item is on the October 26, 2022 DRC Meeting agenda.

Status 11-29-22: Revisions are required. Waiting on revisions to be submitted.

Status 1-9-23: Plans have been conditionally approved by the Town of Bluffton. The Town requires approval from SCDOT and BJWSA for the road closing prior to issuing Final Approval. SCDOT has issued their encroachment permit. Waiting on BJWSA approval.

**PROJECT NAME:** TABBY ROADS PHASE 1

### PUD



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Development Plan Amendment					
DPA-04-17-010844	04/19/2017	495 BUCKWALTER PKWY	Development Plan Amendment	Active	Dan Frazier
Applicant: Ward Edwards, Inc. - USE THIS ACCOUNT		Owner: Cross Outreach Ministries			
<p><b>PLAN DESCRIPTION:</b> The Applicant is requesting approval of a Development Plan Amendment for (PD.08.01.553) for the addition of classroom wing for 7-12 and to expand the multi-purpose/worship facility.</p> <p>STATUS 05/09/17: The Development Plan Amendment is Approved.</p> <p>STATUS 08/24/2017: The Applicant is requesting approval of a Development Plan Amendment to re-configure "Pond 3" to allow for expansion of the multi-purpose field to a regulation sized soccer field. The Development Plan Amendment is scheduled for the Sept. 12 meeting of the DRC.</p> <p>STATUS 09/13/2017: The Sept 12 meeting of the DRC was cancelled to Hurricane Irma. Comments on the Development Plan Amendment will be reviewed at the Sept 19 meeting of the DRC.</p> <p>STATUS 09/21/2017: Comments on the Development Plan Amendment were provided at the Sept. 19 meeting of the DRC. Revisions are required for approval. Awaiting re-submittal.</p> <p>STATUS 06/21/2018: An Amendment to introduce additional phases of construction APPROVED.</p> <p>STATUS 01/20/2019: An application to amend the development plan to construct a chapel have been submitted for review. Comments will be reviewed at the Jan 22 meeting of the DRC.</p> <p>STATUS 02/19/2019: Comments were provided at the Jan. 22 meeting of the DRC. Awaiting re-submittal for Final Approval.</p> <p>STATUS 02/25/2019: Re-submittal materials approved by the Fire Marshall. Final Development Plan is APPROVED.</p> <p>STATUS 10/22/2019: Address created for Chapel, 491 Buckwalter PKWY.</p> <p>STATUS 12/120/2020: A Development Plan Amendment to construct an additional classroom building has been submitted for review.</p> <p>STATUS 2/10/2021: The Development Plan Amendment is APPROVED.</p> <p>STATUS 10/29/2024: The Development Plan Amendment for the Cross Schools Columbarium was heard at the November 6, 2024 Development Review Committee meeting. The DPA is conditionally approved pending stormwater review and approval.</p> <p>STATUS 10/29/2024: The Development Plan Amendment for the Cross Schools Cafeteria Expansion will be heard at the November 27, 2024 Development Review Committee meeting.</p> <p>STATUS 11/8/24: The Development Plan Amendment for the Cross Schools Columbarium is APPROVED.</p> <p>STATUS 11/20/24: The Applicant has submitted a Development Plan Amendment for the expansion of the cafeteria. This item will be heard at the November 27, 2024 Development Review Committee meeting.</p>					
PROJECT NAME:		CHURCH OF THE CROSS AT BUCKWALTER			

Total Development Plan Amendment Cases: 4





# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Master Plan

#### NA

MP-04-22-016566	04/06/2022		Master Plan	Active	Dan Frazier
-----------------	------------	--	-------------	--------	-------------

**Applicant:** Village Park Communities, LLC      **Owner:** Village Park Communities, LLC

**PLAN DESCRIPTION:** A request by Dan Keefer of Witmer Jones Keefer, LTD, on behalf of Village Park Communities, LLC, for approval of Alston Park Phase 3 Master Plan. The project consists of a maximum of 76 dwelling units, park/open spaces and related infrastructure. The subject property, comprised of 2 parcels totaling approximately 63 acres, is identified by Beaufort County Tax Map numbers R610 035 000 0019 0000 and R610 035 000 0846 0000 and commonly referred to as New Riverside Parcel 5A South located within the New Riverside PUD.

STATUS: Initial Master Plan comments were reviewed at the 5/11/22 meeting of the DRC.

STATUS: The Initial Master Plan request received a recommendation of approval at the February 22, 2023, Planning Commission meeting.

STATUS 04/01/24: The Holly Hill Lane Plat is being recorded. A community meeting is tentatively scheduled for May 1, 2024. The application will advance to Town Council once the plat is recorded and the community meeting has been held.

STATUS 4/15/24: A community meeting is was held on May 14, 2024.

STATUS: Awaiting receipt of recorded plat prior to advancing to Town Council. SUB-10-24-019402

**PROJECT NAME:** ALSTON PARK

**Total Master Plan Cases: 1**

### Subdivision Plan

#### General



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Subdivision Plan					
SUB-09-24-019356	09/23/2024	154 CAROLINA OAKS AVE AVENUE	Subdivision Plan	Active	Dan Frazier
Applicant: Thomas and Hutton		Owner: K Hovnanian Four Seasons			
PLAN DESCRIPTION: A request by TJ Behm of Thomas & Hutton, on behalf of Steven Baker of K. Hovnanian Homes for approval of a Subdivision application. The project consists of creating 50 single-family lots out of one existing parcel, identified by tax map number R614 028 000 0002 0000, with associated right-of-way and common areas. The property is zoned Jones Estate PUD and consists of approximately 39.463 acres located west along Carolina Oaks Ave and South along Brandywine Lane. STATUS: This item will be heard at the October 30, 2024 Development Review Committee meeting.					
PROJECT NAME:		Four Seasons at Carolina Oaks			
SUB-09-24-019348	09/18/2024	97 GOETHE RD ROAD	Subdivision Plan	Active	Dan Frazier
Applicant: Pearce Scott Architects		Owner: Clifford Bush, III			
PLAN DESCRIPTION: A request by Pearce Scott Architects, on behalf of Clifford Bush, III, for approval of a Subdivision application. The project consists of subdividing 0.28 acres to create a Western parcel, 0.11 acres, and an Eastern Parcel, 0.17 acres. The property is zoned Residential General and consists of approximately 0.28 acres identified by tax map number R610 039 000 040B 0000. STATUS: This item will be heard at the October 2, 2024 Development Review Committee Meeting.					
PROJECT NAME:		Schultz/Goethe			
SUB-09-24-019334	09/12/2024		Subdivision Plan	Active	Dan Frazier
Applicant: Thomas & Hutton		Owner: LSSD New Riverside, LLC			
PLAN DESCRIPTION: A request by Tyler Vaughn of Thomas and Hutton, on behalf of LSSD New Riverside, LLC, for approval of a subdivision application. The project consists of the subdivision to create 83 single-family lots with associated right of way and common areas for Phase 9 of Heritage at New Riverside. The property is zoned New Riverside PUD and consists of approximately 26.9 acres identified by tax map numbers R614 035 000 1362 0000 and R614 035 000 1318 0000 and located West of the HWY46/170 intersection within the Heritage at New Riverside Master Plan. STATUS: This item will be heard at the October 16, 2024 Development Review Committee Meeting.					
PROJECT NAME:		HERITAGE AT NEW RIVERSIDE PHASE 8 & 9			



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
Active Cases					
Subdivision Plan					
SUB-08-24-019301	08/26/2024		Subdivision Plan	Active	Dan Frazier
Applicant: Thomas and Hutton		Owner: K Hovnanian Four Seasons			
PLAN DESCRIPTION: A request by TJ of Thomas and Hutton, on behalf of Steven Baker of K Hovnanian Homes for approval of a Subdivision application for the Lakes at New Riverside Phase 5. The project consists of the construction of 103 single family residential units lots with associated right-of-way and common areas. The property is zoned New Riverside Planned Unit Development and consists of approximately 31.017 acres identified by tax map numbers R610 044 000 04430 0000 through R610 044 000 0560 0000 and located within Parcel 9 of the New Riverside Concept Master Plan. STATUS: This item will be heard at the October 2, 2024 Development Review Committee meeting.					
PROJECT NAME:		NEW RIVERSIDE -PARCEL 9			
SUB-12-24-019504	12/18/2024	28 WHARF ST STREET	Subdivision Plan	Active	Dan Frazier
Applicant: JRA Holdings LLC		Owner: JRA Holdings LLC			
PLAN DESCRIPTION: Subdivide into 2 lots as shown.					
PROJECT NAME:		OLD TOWN			
SUB-10-24-019408	10/21/2024		Subdivision Plan	Active	Dan Frazier
Applicant: Thomas & Hutton - USE THIS ACCOUNT		Owner: K Hovnanian Four Seasons			
PLAN DESCRIPTION: A request by TJ Behm of Thomas and Hutton, on behalf of Steven Baker of K Hovnanian Homes for approval of a Subdivision application for the Lakes at New Riverside Phase 6. The project consists of the construction of 41 single family residential units with associated right-of-way and common areas. The property is zoned New Riverside Planned Unit Development identified by tax map numbers R610 044 000 04430 0000 through R610 044 000 0560 0000 and located within Parcel 9 of the New Riverside Concept Master Plan. STATUS: This item was heard at the November 27, 2024 Development Review Committee meeting.					
PROJECT NAME:		NEW RIVERSIDE -PARCEL 9			



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Subdivision Plan

SUB-08-24-019309	08/29/2024		Subdivision Plan	Active	Dan Frazier
------------------	------------	--	------------------	--------	-------------

**Applicant:** Ward Edwards, Inc.

**Owner:** Millstone Management LLC

**PLAN DESCRIPTION:** A request by Adrien Dannemiller of Okatie Bluffs Owner LLC, on behalf of Parcel 8, LLC for approval of a Subdivision application. The application consists of subdividing Parcel B-1, approximately 21.68 acres, into six (6) parcels, including access easements, to support the development of Venture at Okatie Bluffs (DP-10-23-018564). The property is zoned Buckwalter Planned Unit Development identified by tax map number R610 028 000 0921 0000 and located within the Parcel B-1 Master Plan.  
**STATUS:** This item will be heard at the October 2, 2024 Development Review Committee meeting.

**PROJECT NAME:** Buckwalter

SUB-12-24-019502	12/17/2024	400 OLD PALMETTO BLUFF RD ROAD	Subdivision Plan	Active	Dan Frazier
------------------	------------	--------------------------------	------------------	--------	-------------

**Applicant:** Thomas & Hutton

**Owner:** Palmetto Bluff Uplands, LLC / May River Forest, LLC

**PLAN DESCRIPTION:** Applicant is proposing 50' and 35' utility and access easement for a cell tower to be located at the Palmetto Bluff WWTF.

**PROJECT NAME:** PALMETTO BLUFF PHASE 2

SUB-09-24-019370	09/30/2024	84 B SHULTS RD ROAD	Subdivision Plan	Active	Dan Frazier
------------------	------------	---------------------	------------------	--------	-------------

**Applicant:** Miguel Zuniga

**Owner:** Cleven Bush

**PLAN DESCRIPTION:** A request by Miguel Antonio Zuniga on behalf of Cleven Bush for approval of a Subdivision application. The project consists of creating two (2) lots out of one (1) existing lot, identified by tax map number R610 039 000 0153 0000, with associated access easement. The property is zoned Residential General and consists of approximately 0.51 acres located west of Goethe Road.  
**STATUS:** This item will be heard at the October 30, 2024 Development Review Committee Meeting.

**PROJECT NAME:** SHULTZ TRACT

**Total Subdivision Plan Cases: 9**

### Zoning Action



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Zoning Action

#### UDO Text Amendment

ZONE-09-24-019360	09/24/2024	41 THOMAS HEYWARD ST STREET	Zoning Action	Active	Charlotte Moore
-------------------	------------	-----------------------------	---------------	--------	-----------------

**Applicant:** Keith Fisher

**Owner:**

**PLAN DESCRIPTION:** Request for inclusion of carports in the UDO.  
STATUS 09.24.2024: Requires a pre-application meeting. Staff will contact applicant.

**PROJECT NAME:** OLD TOWN

ZONE-03-18-011836	03/26/2018		Zoning Action	Active	Kevin Icard
-------------------	------------	--	---------------	--------	-------------

**Applicant:** Town of Bluffton

**Owner:** Town of Bluffton

**PLAN DESCRIPTION:** A request by the Unified Development Ordinance Administrator for consideration of revisions to the following sections of the Town of Bluffton's Municipal Code of Ordinances, Chapter 23, Unified Development Ordinance:

1.1.8 Activities That Do Not Constitute Development; 2.2 Establishment; 3.2 General Application Approval Process; 3.9 PUD Master Plan; 3.18 Certificate of Appropriateness – Historic District (HD); 3.19 Site Feature – Historic District (HD); 3.20.2 Applicability; 3.25 Designation of Contributing Structure; 3.26 Appeals; 4.4 Conditional Use Standards; 5.3.7 Specific Landscaping Standards; 5.15 Old Town Bluffton Historic District; 7.2.2. Illegal Nonconformities; 7.9 Nonconforming Sites Resulting from Right-Of-Way Dedication or Acquisition; 9.2 Definitions; 9.3 Interpretation of Dimensional Standards; and, 9.4 Description of Uses of Land and Buildings

STATUS: 1/29/2019 The Application was heard at the January 23, 2019 Planning Commission meeting where it was recommended for approval to Town Council with conditions related specifically to Public Projects, Minor and Major PUD Master Plans, Development Plans, requiring public notice for various projects and to include language related to appeals.

STATUS: 2/18/2019 The Application will be heard at the March 12th Town Council meeting.

STATUS: 5/28/2019 A portion of the text amendments were approved by Town Council at their March 12, meeting. Additional items will be presented to Town Council at a future date.

STATUS: 4/21/2020 Various UDO text amendments are being reviewed by Planning Commission, and Town Council over the coming months.

STATUS: 4/22/2024 - Staff continues to bring forth UDO edits to be reviewed by Planning Commission, and Town Council.

**PROJECT NAME:**

#### Zoning Map Amendment



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Zoning Action

ZONE-06-24-019188	06/17/2024	332 BUCK ISLAND RD ROAD	Zoning Action	Active	Dan Frazier
-------------------	------------	-------------------------	---------------	--------	-------------

**Applicant:** Town of Bluffton

**Owner:** Town of Bluffton

**PLAN DESCRIPTION:** A request by the Town of Bluffton for Zoning Map Amendment of approximately 1.38 acres located at 328, 330 and 332 Buck Island Road identified as Beaufort County Tax Map Numbers R 610 039 000 0016 0000 (328 and 330 Buck Island Road) and R610 039 000 018C 0000 (332 Buck Island Road) to Rezone the Subject Property to the Light Industrial (LI) District.

STATUS 8/29/24: The workshop was held at the July 24, 2024 Planning Commission meeting. The Public Hearing and Recommendation to Town Council is tentatively scheduled for September 25, 2024 Planning Commission meeting.

**PROJECT NAME:** BUCK ISLAND/SIMMONSVILLE

ZONE-02-24-018921	02/02/2024	11 GRASSEY LANE	Zoning Action	Active	Dan Frazier
-------------------	------------	-----------------	---------------	--------	-------------

**Applicant:** Sturre Design & Development, LLC

**Owner:**

**PLAN DESCRIPTION:** A request by Nathan Sturre of Sturre Engineering on behalf of the property owners Cornerstone Church of Bluffton and Lalie Ann Mole, for approval of a zoning map amendment. The applicant is requesting to rezone two parcels from the Planned Unit Development (PUD) zone district to a mix of Agricultural (AG) and Rural Mixed Use (RMU) zoning districts. The properties are zoned Mindstream Academy Planned Unit Development and consists of approximately 43.3 acres identified by tax map numbers R610 036 000 0014 0000 and R610 036 000 014B 0000 located south of May River Road approximately 600 feet east of Stardust Lane.

STATUS: A required Planning Commission Workshop was held on February 28, 2024. STATUS 03/27/24: The Planning Commission recommended approval of the request at the March 27, 2024, Planning Commission Meeting.

STATUS: First reading of the Zoning Map Amendment was approved at the April 9, 2024, meeting of Town Council.

STATUS: Public Hearing and Second & Final Reading of the Zoning Map Amendment request will approved at the May 14, 2024, meeting of Town Council.

**PROJECT NAME:**





# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Zoning Action

ZONE-01-24-018840	01/11/2024		Zoning Action	Active	Dan Frazier
-------------------	------------	--	---------------	--------	-------------

**Applicant:** University Investments

**Owner:** University Investments

**PLAN DESCRIPTION:** A request by University Investments, LLC, for a Zoning Map Amendment for approximately 65.592 acres located at the northwest corner of the intersection of Buckwalter Parkway and Lake Point Drive and identified by Beaufort County Tax Map Nos. R600 029 000 2410 0000 and R600 029 000 0014 0000 to rezone the subject property to Buckwalter Planned Unit Development (PUD) subject to a new Grande Oaks Commons Land Use Tract to be established through a Buckwalter PUD Text Amendment. This application is associated with the following requests; ANNEX-11-23-018624, CPA-01-24-018845, COMP-01-24-018844, ZONE-02-24-018991 (Text), and DAA-01-24-018842.

STATUS: Comments on the associated Concept Plan Amendment were heard at the March 27, 2024 meeting of the DRC.

STATUS: This request was heard at the May 22, 2024, Planning Commission Meeting as a Public Workshop item.

STATUS: The Public Hearing for the zoning map amendment and comprehensive plan amendment are tentatively scheduled for the July 24, 2024, Planning Commission meeting.

STATUS 8/29/24: The zoning map amendment and comprehensive plan amendment were heard at the July 24, 2024 Planning Commission meeting. Tentatively scheduled for the September 10, 2024 Town Council meeting for first reading.

#### PROJECT NAME:

ZONE-03-24-019046	03/14/2024		Zoning Action	Active	Dan Frazier
-------------------	------------	--	---------------	--------	-------------

**Applicant:** Bryant and Son Trucking Company

**Owner:** Bryant and Son Trucking Company

**PLAN DESCRIPTION:** A request by the applicant and property owner Johnnie Bryant III, for approval of a zoning map amendment application. The property is located at 30 Davis Road and consists of approximately 2.14 acres identified by tax map number R600 029 000 0028 0000 and currently zoned T2R Rural in unincorporated Beaufort County. This application is associated with the following annexation request; ANNEX-03-24-019045.

STATUS: This request was heard at the May 22, 2024, Planning Commission Meeting as a Public Workshop item.

STATUS: The Public Hearing for the zoning map amendment and comprehensive plan amendment are tentatively scheduled for the July 24, 2024, Planning Commission meeting.

STATUS 8/29/24: The zoning map amendment and comprehensive plan amendment were heard at the Planning Commission meeting. The amendments were heard at the August 13, 2024 Town Council meeting for First Hearing. The Second Hearing is tentatively scheduled for October 8, 2024 Town Council Meeting.

#### PROJECT NAME:

### Zoning Variance



# Growth Management Application Update Report

Town of Bluffton  
Department of Growth Management  
Office of Planning and Community Development  
20 Bridge Street P.O. Box 386 Bluffton, South Carolina 29910

Attachment

Section XI. Item #1.

Case Number	Application Date	Property Address	Plan Type	Plan Status	Plan Mgr
-------------	------------------	------------------	-----------	-------------	----------

## Active Cases

### Zoning Action

ZONE-12-24-019470 12/03/2024 1181 A MAY RIVER RD ROAD Zoning Action Active Dan Frazier

**Applicant:** Court Atkins **Owner:** Trever Wells

**PLAN DESCRIPTION:** The Applicant, Jason Broene of Court Atkins Architects, Inc., on behalf of the property owner Trevor Wells, is requesting a variance from Unified Development Ordinance (UDO) Section 5.3.7.B.2.b to allow a 35-foot encroachment into the 50-foot Highway Corridor Overlay District vegetative buffer along SC HWY 46 (May River Road). The property is zoned Neighborhood Core (NC) and consists of approximately 0.36 acres identified by tax map number R610 039 000 097A 0000 within Old Town Bluffton.  
**STATUS:** This item will be heard at the January 7, 2025 Board of Zoning Appeals meeting.

**PROJECT NAME:** OLD TOWN

### Zoning Variance Residential

ZONE-12-24-019474 12/06/2024 375 HAMPTON PKWY PARKWAY Zoning Action Active Dan Frazier

**Applicant:** Fields and Company LLC - USE THIS ACCOUNT **Owner:** Menachen Hertz

**PLAN DESCRIPTION:** The Applicant, Melvin Fields of Fields and Company, LLC, on behalf of the property owners Menachem M. Hertz and Sheina N. Groner, is requesting a variance from the Beaufort County Development Standards Ordinance 90/3 Section 4.3.3. (A) to allow an approximately 4-foot encroachment in the 35-foot setback requirement from Hampton Parkway. The property is zoned Buckwalter PUD and consists of approximately 5.37 acres identified by tax map number R610 029 000 2482 0000 within the Parcel 10A, 10B, and 10D Master Plan.  
**STATUS:** This item will be heard at the January 7, 2025 Board of Zoning Appeals meeting.

**PROJECT NAME:**

Total Zoning Action Cases: 8

Total Active Cases: 87

Total Plan Cases: 87



**Town of Bluffton**  
 20 Bridge St.  
 PO Box 386  
 Bluffton, SC 29910  
 843.706.4500

**To:** Town Council  
**From:** Stephen Steese, Town Manager  
**Date:** January 2, 2025

### **Town Operations / Community Meetings**

- We are preparing for two ribbon-cuttings and openings for the first of the year.
  - January 25<sup>th</sup> – Opening of the New Riverside Park. Celebration with music, drinks, and food.
  - January 6<sup>th</sup> – Opening of the Welcome Center. This will be a soft opening as we get everything finalized for the Grand Opening on February 3<sup>rd</sup>.
- The Town held our Tree Lighting event on December 6<sup>th</sup> and Christmas Parade on December 7<sup>th</sup>. Both events went well and were well attended. We had a debrief the following week to review ways to continue to improve. There was also a Hannukah Celebration on December 29<sup>th</sup> in Martin Family Park.
- Staff met with the engineer that is reviewing the entire Bluffton Parkway as part of the LATS study. They are hoping to have their recommendations in draft form and have a public input session in February and will present to the LATS committee in the future.
- Town Hall was closed on the December 24<sup>th</sup> and 25<sup>th</sup> in observance of Christmas and January 1<sup>st</sup> in observance of New Year's Day.

### **Town Council/Town Attorney Related Meetings**

- Weekly Mayor / Mayor Pro Tempore / Manager meetings.
- Mayor Toomer, Councilman Wood, and Executive met with our State House and Senate members to discuss the upcoming legislative session and priorities. Rep. Herbkersman was not able to attend, but I met with him the following week. I sent an email outlining the topics of discussion.
- I met with the Historic Bluffton Foundation Director following discussion at the December Council Meeting. They have provided an estimated costs for the docents and the amount awarded by Council will cover these costs. We will meet after the first of the year to determine whether we will bring in house or continue to contract with HBF.
- Based on input during the Workshop item, staff and legal have made edits to the proposed Buckwalter Development Agreement Amendment and Willow Run. We are waiting on the signed application from the owner and BCSD to start the process.
- Please note that we have Hometown Legislative Action Day in January. There will be no session on January 21<sup>st</sup>, but we will have the training and regional dinner. We will update should any of legislators be in town, but we do not plan to visit them that day.

### **Updates and Miscellaneous Information**

- December kicked off the start of the FY 25-26 Budget Process. Meetings were held with all departments to review potential staff and capital requests due in January.
- The Splash Pad at Oscar Frazier Park closed for the season on December 2<sup>nd</sup>. We will work to prepare it for the winter and plan a kickoff for the opening in 2025.

TOWN COUNCIL

STAFF REPORT  
Executive Department



MEETING DATE:	January 13, 2025
PROJECT:	Consideration of Renewal of Memorandum of Agreement, Residential Waste Reimbursement (Fiscal Impact – approx. \$193,744)
PROJECT MANAGER:	Chris Forster, Assistant Town Manager

**REQUEST:** Staff recommends renewal of the Memorandum of Agreement for Palmetto Bluff Preservation Trust, Inc. to reimburse for their residential waste removal at the current rates that the Town pays to Waste Management for residential waste removal. Recycling is not included.

**BACKGROUND:** Due to the unique character of the residences within the confines of Palmetto Bluff, the developers of opted to contract for their own residential trash removal and seek reimbursement from the Town for the services paid by their respective residents. These contractual arrangements have been in place at Palmetto Bluff since 2013.

**SUMMARY:** The agreement requires Palmetto Bluff to provide the Town with an invoice showing the actual dollar amount paid for the prior year, also noting whether properties are full time residences, part time residences, or unoccupied. In no circumstance would the Town reimburse an amount greater than what would be paid to Waste Management for the same service. No reimbursement is made for unoccupied homes or for commercial properties.

The budgeted for reimbursement for the calendar year is \$193,744 however it represents no net financial impact to the Town because the money would otherwise go to Waste Management for the same services.

**NEXT STEPS:** Authorize the Town Manager to sign a one-year renewal with Palmetto Bluff Preservation Trust, Inc. for services in Palmetto Bluff.

**ATTACHMENTS:**

- 1. DRAFT Agreement 2014-10, Amendment 6 with Palmetto Bluff Preservation Trust, Inc.
- 2. Recommended Motion
- 3. Resolution

STATE OF SOUTH CAROLINA )  
 )  
 COUNTY OF BEAUFORT )

**AMENDMENT 6  
 TO  
 MOU # 2014-10**

**WITNESSETH:**

**THIS MEMORANDUM OF UNDERSTANDING (“MOU”)** is made this \_\_\_\_\_ day of \_\_\_\_\_, 2025 between the Town of Bluffton (“Town”), a municipal corporation organized and existing under the laws of the State of South Carolina and Palmetto Bluff Preservation Trust, Inc. (the “Trust”).

**WHEREAS**, the Trust provides residential garbage removal services to the residents of the Palmetto Bluff community in accordance with the Community Charter for Palmetto Bluff as recorded in Beaufort County Register of Deeds on April 17, 2003 at Book 1747, Page 2090 (as amended, restated, supplemented or otherwise modified from time to time); and

**WHEREAS**, the Town made an agreement effective August 15, 2013 with the Trust to reimburse for residential garbage removal services in the Palmetto Bluff community in calendar years ending 2013, 2014, and 2015 at the prevailing rates the Town paid their contractor for residential garbage removal; and

**WHEREAS**, that agreement was renewed on July 1, 2016 for calendar years ending 2016, 2017 and 2018 through December 31, 2018; and

**WHEREAS**, that agreement was renewed on March 27, 2019 for calendar years ending 2019, 2020 and 2021 through December 31, 2021; and

**WHEREAS**, that agreement was renewed on December 21, 2021 for one additional term for the period from January 1, 2022 to December 31, 2022; and

**WHEREAS**, that agreement was renewed on November 9, 2022 for one additional term for the period from January 1, 2023 to December 31, 2023; and

**WHEREAS**, that agreement was renewed on May 15, 2024 for one additional term for the period from January 1, 2024 to December 31, 2024; and

**WHEREAS**, the Town desires to reimburse the Trust for residential garbage removal services in the Palmetto Bluff community for calendar year 2025, effective January 1, 2025 through December 31, 2025; and

**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 parties agree as follows:

1. The total compensation paid by the Town to the Trust for these services shall be equal to the current monthly fee paid by the Town to its provider (at the time of this contract, Waste Management) for other municipal residential properties unless the fee paid by a particular property was less; in no case will the Town reimburse for more than was paid during a calendar year. No compensation will be made for unoccupied homes or commercial properties.
2. The Trust shall provide to the Town by February 1<sup>st</sup> each year a copy of the invoice they received for garbage services covering the preceding year for qualifying residential properties. Qualifying residential properties are those that remit residential property tax for the calendar year. Developer shall supplement the invoice by designating whether a property is occupied full-time, part-time, or is an unoccupied home.
3. Developer shall send invoices via email to [invoice@townofbluffton.com](mailto:invoice@townofbluffton.com) with the reference **MOU 2014-10**. In the alternative, invoices may be sent to the Town of Bluffton, PO Box 386, Bluffton, South Carolina, 29910. Approved invoices shall be paid within a practical period once due diligence procedures have been

performed on the documentation by the Town of Bluffton Finance Department, but not later than June 30<sup>th</sup> of the fiscal year in which the invoice was received.

4. General Terms and Conditions:

- a. The Town Manager or his designee may terminate this MOU in whole or in part at any time for the convenience of the Town. If the MOU is terminated for the convenience of the Town, the Town will pay the Trust as agreed up to the date of termination.
- b. Should any part of this MOU 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 MOU.
- c. This MOU 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.

**IN WITNESS WHEREOF**, the parties hereto have caused the within Amendment 6 to Memorandum of Understanding 2014-10 to be executed this \_\_\_\_\_ day of \_\_\_\_\_, 2025.

PALMETTO BLUFF PRESERVATION TRUST, INC.	TOWN OF BLUFFTON
Date: _____	Date: _____
By: _____	By: _____
Print Name: <u>Tim Struzynski</u>	Print Name: <u>Stephen Steese</u>
Position: <u>Director, POA</u>	Position: <u>Town Manager</u>
Witnesses: _____	Witnesses: _____



Attachment 2

Recommended Motion

Consideration to Approve a Resolution for Renewal of a Memorandum of Agreement between the Town of Bluffton and Palmetto Bluff Preservation Trust, Inc. – Chris Forster, Assistant Town Manager

**“I make a motion to approve a resolution for renewal of a Memorandum of Agreement between the Town of Bluffton and Palmetto Bluff Preservation Trust, Inc. for residential waste removal at the current rates that the Town pays to Waste Management for residential garbage removal. Recycling is not included.”**

**Attachment 3**

**A RESOLUTION**

RELATING TO THE TOWN OF BLUFFTON, SOUTH CAROLINA, SUPPORT OF RENEWAL OF A  
MEMORANDUM OF AGREEMENT FOR RESIDENTIAL WASTE REMOVAL REIMBURSEMENT

**WHEREAS**, the Town of Bluffton provides residential trash removal for its citizens via a competitively awarded third party contract; and

**WHEREAS**, since August 15, 2013, the community of Palmetto Bluff has desired to make separate arrangements for residential trash removal for its residents with special considerations for noise, schedule, truck size and the environment; and

**WHEREAS**, the Town has agreed to withhold the same Town-provided services and instead reimburse Palmetto Bluff Preservation Trust, LLC the same amount for those services for its residents; and

**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 renew the term of the Memorandum of Agreement with Palmetto Bluff Preservation Trust, Inc. for reimbursement of residential waste fees not to exceed the rate the Town pays to its current contractor for their private pick-up arrangements.

Approved this 12<sup>th</sup> day of January 2025.

---

Larry Toomer, Mayor

Town of Bluffton, South Carolina

ATTEST:

---

Marcia Hunter, Town Clerk

SEAL

**TOWN COUNCIL  
STAFF REPORT  
Finance & Administration Department**



<b>MEETING DATE:</b>	January 14, 2025
<b>PROJECT:</b>	Acceptance of the Town of Bluffton FY2024 Audit performed by Mauldin and Jenkins, LLC
<b>PROJECT MANAGER:</b>	Natalie Majorkiewicz, CGFO, CGFM, Director of Finance & Administration

**RECOMMENDATION:**

Town Council accept the Fiscal Year 2024 Audit for the Town of Bluffton presented by Mauldin & Jenkins, LLC on December 10, 2024 and its inclusion in the Annual Comprehensive Financial Report for the year ending June 30, 2024.

**BACKGROUND/DISCUSSION:**

On March 2, 2021, the Town of Bluffton solicited a Request for Proposal (RFP) for Financial Audit Services. As a result, Town Council authorized the Town Manager to execute a contract with Mauldin & Jenkins, LLC for audit services for fiscal year ending June 30, 2021 through fiscal year ending June 30, 2026 during the June 8, 2021 Town Council meeting. This is the second contract awarded to Mauldin & Jenkins. This is the sixth year Mauldin & Jenkins has audited the Town of Bluffton's financial records and assisted in the preparation of the Annual Comprehensive Financial Report (ACFR).

On December 10, 2024, Trey Scott, CPA and Partner with Mauldin & Jenkins, LLC presented the annual financial audit for fiscal year ended June 30, 2024. The Town was issued an unmodified (clean) opinion with no findings or management letter comments.

**CURRENT STATUS:**

Mauldin & Jenkins has completed their audit of the Town of Bluffton for the fiscal year ended June 30, 2024 and issued an unmodified (clean) opinion.

The Town has submitted the ACFR to the Government Finance Officers Association on December 31, 2024 for consideration for award of the Certificate of Achievement for Excellence in Financial Reporting. The Town has earned the certificate for sixteen consecutive years.

**ATTACHMENTS:**

- Attachment 1: FY2024 ACFR
- Attachment 2: Resolution
- Attachment 3: Recommended Motion



Town of  
**BLUFFTON**  
*South Carolina*



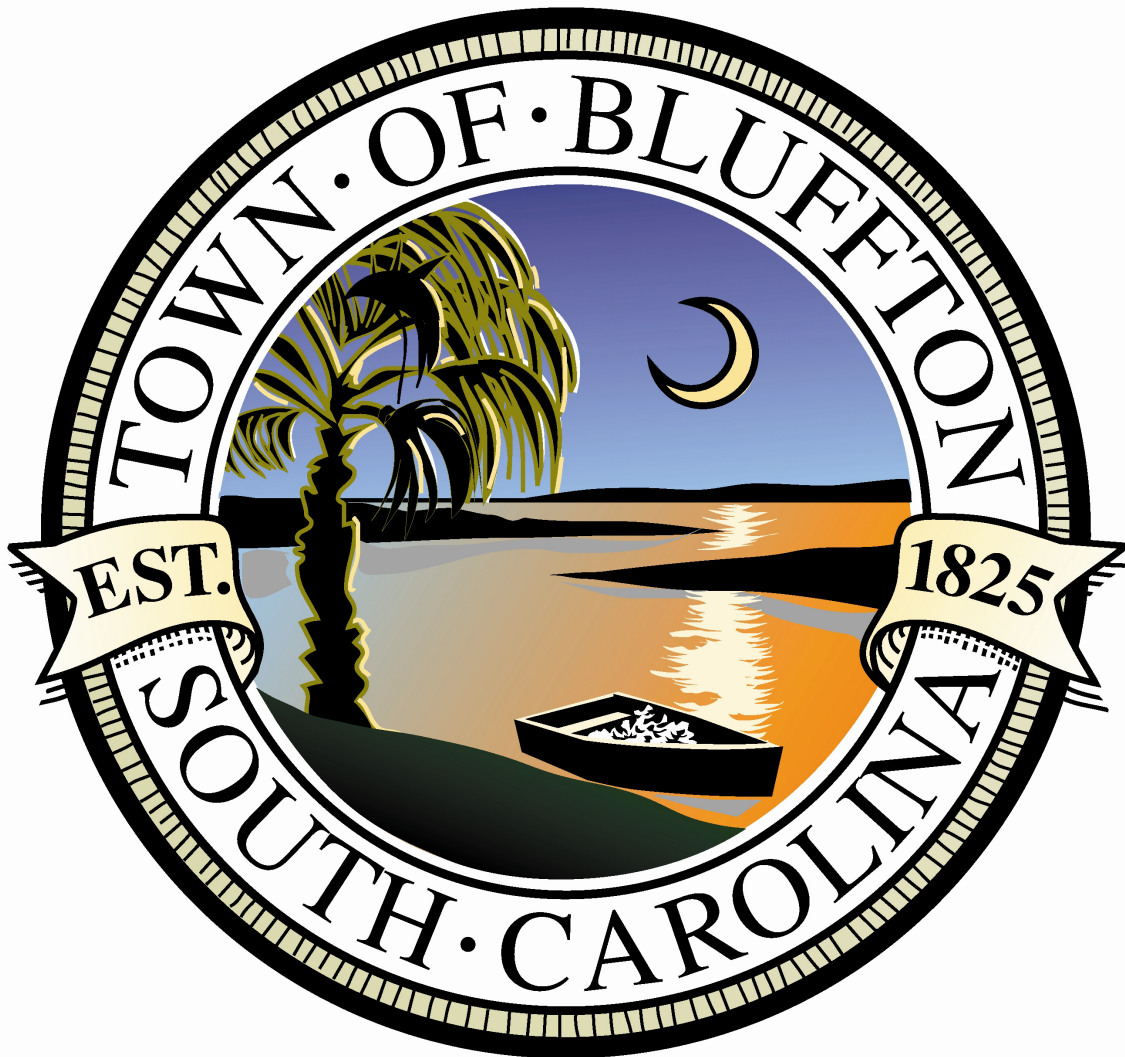
ANNUAL COMPREHENSIVE  
FINANCIAL REPORT

For the Fiscal Year Ended June 30, 2024



[www.TownofBluffton.sc.gov](http://www.TownofBluffton.sc.gov)

Annual Comprehensive Financial Report for the  
**Town of Bluffton, South Carolina**  
For the Year Ended June 30, 2024



*Prepared by:*  
Finance Department

Chris Forster, MPA, CPFO, CGFM  
Assistant Town Manager

**TOWN OF BLUFFTON,  
SOUTH CAROLINA**

**ANNUAL COMPREHENSIVE FINANCIAL REPORT**

**FOR THE FISCAL YEAR ENDED  
JUNE 30, 2024**



# ANNUAL COMPREHENSIVE FINANCIAL REPORT FOR THE FISCAL YEAR ENDED JUNE 30, 2024

## TABLE OF CONTENTS

### Page

### INTRODUCTORY SECTION

Transmittal Letter .....	i – iv
Principal Officials .....	v
Organizational Chart .....	vi
GFOA Certificate Of Achievement.....	vii

### FINANCIAL SECTION

Independent Auditor's Report .....	1 – 4
Management's Discussion and Analysis .....	5 – 15

### FINANCIAL STATEMENTS

#### Government-wide Financial Statements

Statement of Net Position.....	16
Statement of Activities.....	17

#### Fund Financial Statements

Balance Sheet – Governmental Funds.....	18 and 19
Reconciliation of the Governmental Funds Balance Sheet to the Statement of Net Position .....	20
Statement of Revenues, Expenditures and Changes in Fund Balances – Governmental Funds .....	21 and 22
Reconciliation of the Statement of Revenues, Expenditures and Changes in Fund Balances of Governmental Funds to the Statement of Activities.....	23
Statement of Revenues, Expenditures and Changes in Fund Balances – Budget and Actual – GAAP Basis – General Fund .....	24
Statement of Revenues, Expenditures and Changes in Fund Balances – Budget and Actual – GAAP Basis – Stormwater Fund.....	25
Statement of Revenues, Expenditures and Changes in Fund Balances – Budget and Actual – GAAP Basis – Local Accommodations Tax Fund.....	26
Statement of Revenues, Expenditures and Changes in Fund Balances – Budget and Actual – GAAP Basis – Hospitality Tax Fund .....	27
Notes to Financial Statements .....	28 – 59

### REQUIRED SUPPLEMENTARY INFORMATION

Schedule of Proportionate Share of the Net Pension Liability – South Carolina Retirement System.....	60
Schedule of Proportionate Share of the Net Pension Liability – Police Officers' Retirement System .....	60
Schedule of Contributions – South Carolina Retirement System.....	61
Schedule of Contributions – Police Officers' Retirement System .....	61

# ANNUAL COMPREHENSIVE FINANCIAL REPORT FOR THE FISCAL YEAR ENDED JUNE 30, 2024

## TABLE OF CONTENTS (CONTINUED)

### Page

## FINANCIAL SECTION (CONTINUED)

### OTHER SUPPLEMENTARY INFORMATION

#### Combining and Individual Fund Financial Statements and Schedules:

Combining Balance Sheet – Nonmajor Governmental Funds .....	62
Combining Statement of Revenues, Expenditures and Changes in Fund Balances – Nonmajor Governmental Funds.....	63
Schedule of Revenues, Expenditures and Changes in Fund Balances – Budget and Actual – GAAP Basis – General Fund.....	64
Schedule of Revenues, Expenditures and Changes in Fund Balances – Budget and Actual – GAAP Basis – Capital Improvement Programs Fund.....	65
Schedule of Revenues, Expenditures and Changes in Fund Balances – Budget and Actual – GAAP Basis – Debt Service Fund .....	66
Schedule of Revenues, Expenditures and Changes in Fund Balances – Budget and Actual – GAAP Basis – Stormwater Fund .....	67

## SUPPLEMENTAL SECTION

Uniform Schedule of Court Fines, Assessments and Surcharges (per ACT 96) .....	68 and 69
--	-----------

## STATISTICAL SECTION

### Statistical Information:

Schedule 1: Net Position by Component.....	70
Schedule 2: Changes in Net Position .....	71
Schedule 3: Program Revenues by Function/Program.....	72
Schedule 4: Fund Balances – Governmental Funds.....	73
Schedule 5: Changes in Fund Balances – Governmental Funds .....	74
Schedule 6: Tax Revenues by Source – Governmental Funds .....	75
Schedule 7: Assessed Value and Estimated Actual Value of Taxable Property .....	76
Schedule 8: Direct and Overlapping Property Tax Rates .....	77
Schedule 9: Principal Property Taxpayers .....	78
Schedule 10: Property Tax Levies and Collections .....	79
Schedule 11: Direct and Overlapping Sales Tax Rates.....	80
Schedule 12: Ratios of Outstanding Debt by Type .....	81
Schedule 13: Ratios of Net General Bonded Debt Outstanding .....	82
Schedule 14: Direct and Overlapping Governmental Activities Debt.....	83
Schedule 15: Legal Debt Margin Information .....	84
Schedule 16: Pledged Revenue Coverage .....	85
Schedule 17: Demographic and Economic Statistics .....	86
Schedule 18: Principal Employers .....	87

**ANNUAL COMPREHENSIVE FINANCIAL REPORT  
FOR THE FISCAL YEAR ENDED JUNE 30, 2024**

---

**TABLE OF CONTENTS (CONTINUED)**

**Page**

**STATISTICAL SECTION (CONTINUED)**

Schedule 19: Full-Time Equivalent Town Government Employees by Function/Program.....	88
Schedule 20: Operating Indicators by Function/Program .....	89
Schedule 21: Capital Asset Statistics by Function/Program .....	90

**COMPLIANCE SECTION**

Independent Auditor's Report on Internal Control over Financial Reporting and On Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with <i>Government Auditing Standards</i> .....	91 and 92
Independent Auditor's Report on Compliance for Each Major Federal Program and on Internal Control over Compliance Required by the Uniform Guidance.....	93 – 95
Schedule of Expenditures of Federal Awards.....	96
Notes to the Schedule of Expenditures of Federal Awards.....	97
Schedule of Findings and Questioned Costs .....	98 and 99

## INTRODUCTORY SECTION

Larry Toomer  
Mayor  
Dan Wood  
Mayor Pro Tempore  
Stephen Steese  
Town Manager



*Council Members*  
Fred Hamilton  
Bridgette Frazier  

---

Marcia Hunter  
*Town Clerk*

December 18, 2024

To the Mayor and Members of Town Council, and the Citizens of the Town of Bluffton, South Carolina:

We are pleased to submit the Annual Comprehensive Financial Report ("ACFR") of the Town of Bluffton, South Carolina (the "Town") for fiscal year ended June 30, 2024.

State law requires that all general-purpose municipal governments publish a complete set of financial statements in conformity with generally accepted accounting principles ("GAAP") and audited in accordance with generally accepted auditing standards by a firm of licensed certified public accountants. In addition to meeting this requirement, this report is more comprehensive than the minimum basic financial statement requirements. It consists of management's representations concerning the finances of the Town and supports management's commitment to full disclosure as reflected in the informative financial analyses provided herein.

Town management assumes full responsibility for the completeness and accuracy of the data provided in this report utilizing the Town's established comprehensive framework of internal controls. These internal controls protect the Town's assets from loss, theft, and misuse as well as provide reliable information for the preparation of this report. As the cost of internal controls should not outweigh their benefits, the Town's controls have been designed to provide reasonable, rather than absolute, assurance that the financial statements are free of any material misstatements. As management, to the best of our knowledge and belief, this financial report is complete, accurate, and reliable in all material aspects. These Financial Statements have been prepared by the Finance Department in accordance with GAAP for local governments.

The Town's financial statements have been audited by Mauldin & Jenkins, LLC. Based upon their independent audit, an unmodified opinion was rendered for the Town's Financial Statements for the fiscal year ended June 30, 2024. The Independent Auditors' Report is presented as the first component of the financial section of this report.

GAAP require that management provide a narrative, introduction, overview, and analysis to accompany the basic financial statements in the form of the Management's Discussion and Analysis ("MD&A"). This letter of transmittal is designed to complement the MD&A and should be read in conjunction with it. The Town's MD&A can be found immediately following the report of the independent auditors.

### **Town of Bluffton Profile**

The Town of Bluffton, settled in 1825 and incorporated in 1852, is located in Beaufort County, a southern coastal county in South Carolina. The Town is located just 12 miles west of Hilton Head Island, SC and approximately 20 miles northeast of Savannah, Georgia. It is situated on a high bluff overlooking the May River, a pristine waterway that has strongly contributed to the Town's history and continued success.

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 both the Town's manager and attorney. The Town Manager carries out the policies and ordinances of the Council, oversees the day-to-day operations of the Town, and appoints the heads of the various departments.

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.

The original Town boundary was approximately one square mile in area (640 acres). When the Town's neighboring resort area of Hilton Head Island began to reach the "build out" stage of their development, Town of Bluffton officials began to recognize the enormous amount of growth that would soon face the Town. All of the land outside the Town's original "one square mile" was in the jurisdiction of Beaufort County. Instead of ignoring the growth in the area, the Town began to voluntarily annex land in order to provide local control over future development.

The first large tract annexation took place on November 23, 1998 and included Palmetto Bluff (20,660 acres) and the Shults Tract (620 acres). Since then, the Town has approved 48 annexations increasing the Town's boundary to approximately 54 square miles in area. In just a few years, the Town grew from a one square-mile-town to controlling the future development of more than 34,667 acres, a majority of which is located three or more miles from the heart of the Town.

According to the 2020 U.S. Census, the Town is one of the State's fastest growing municipalities and the State's 4<sup>th</sup> largest municipality in area. The 2020 Census shows the Town had approximately 27,716 citizens compared to 12,893 in the 2010 Census, a 215% increase.

### **Local Economy**

According to the U.S. Census Bureau, the 2020 median family income for the Town was \$74,489 compared to \$67,344 in the 2010 Census. The 2020 Census shows the per capita income for Beaufort County as \$59,318, as compared to \$47,502 for South Carolina.

For the year ended June 30, 2024, the building industry remains strong with new single-family/multi-family housing permits being issued consistently and a stable revenue stream for Building Permits and Development Fees of approximately \$3.3 million. The Town issued approximately 3,850 business licenses, with almost 2,300 of these businesses located within Town limits. Business License revenue increased over last year 19% to approximately \$4.5 million. Contractors represent approximately 12% of in-town businesses and Professional Services represent approximately 16%. Other predominate in-town businesses include Retail, Medical, Personal Services (beauty and spa services, pet services, event planners and suppliers, photographers, etc.), and Restaurants.

The Don Ryan Center for Innovation (DRCI) was a public-private partnership initiated by Clemson University, eviCore Healthcare, and the Town of Bluffton to establish the state's first incubator in a non-metropolitan area of the state. The Council authorized the merger of the DRCI Incubator and the Bluffton Public Development Corporation (PDC) in late FY 2018 into a single entity known as the Don Ryan Center for Innovation. This merger was approved by the State of South Carolina on July 31, 2017. The DRCI fosters and promotes economic development in these general areas: Business Incubation, Economic Development, Membership, and Member Flex Space (the HUB). The goal is to create a vibrant entrepreneurial business climate within the region. The DRCI has graduated over 30 companies that have created more than 100 new jobs for the region.



## Major Initiatives and Revitalization Efforts

Sewer, lighting and sidewalk projects cost approximately \$3.36 million, with the Buck Island Sewer Phase 5 project accounting for over \$2.02 million.

Parks improvement project spending of nearly \$7.14 million includes the 37-acre New Riverside Park and Barn project using TIF Bonds as well as significant renovations and improvements at Oyster Factory Park.

Facilities improvement projects cost approximately \$1.80 million with almost \$1.4 million spent in fiscal year 2024 on the Squire Pope Carriage House as restoration is nearly complete.

## Budget Process

The Town's budget serves as the foundation for financial planning and control. Annual strategic planning sessions provide the areas of focus for each department as they prepare their budgets. This year's process encompassed a five-year plan for capital projects.

The budget planning process begins in December of each year. Each department prepares a comprehensive list of goals and objectives highlighting the programs, projects and initiatives to be considered for the upcoming fiscal year. The departments submit their requests for general fund appropriation to the Town Manager in the spring of each year.

The Capital Improvements Program ("CIP") is developed through input from the citizens and the Town's Planning Commission. Their input is used as the starting point for developing a proposed budget.

The Finance staff prepares and forwards revenue estimates for both the current and upcoming fiscal year. The expenditure proposals are compared to the revenue projections to serve as a mechanism for the Town Manager to make necessary adjustments in programs and priorities, if needed, to ensure a balanced budget and sufficient fund balance for the financial integrity of the Town.

The Town Manager presents this proposed budget to Council for review in May of each year. Council is required under state law to hold a public hearing and to adopt a final budget no later than June 30, the close of the Town's fiscal year.

The appropriated budget is prepared by major fund and department. Once adopted by Council, the budgetary control is maintained by the Town Manager at the fund level. Council must approve by ordinance any amendment to the budget which causes a change in the total appropriation of any fund.

## Long-term Financial Planning

As a part of the budget process, the Town began developing long-range financial plans in 2006. Additionally, the Town has held strategic planning sessions the last eight (8) years to develop and update strategic goals and objectives for Council and staff. Town staff prepares the budget forecasts based largely on the experience the Town has had in the prior years and growth based on developer projections that could reasonably be anticipated in the future. All revenues and expenditures in the General Fund and Capital Projects Fund are analyzed and forecasts developed for the upcoming budget year and three (3) future years. This enables management to make proactive decisions for changes in service or tax and fee increases or decreases while providing a snapshot of revenue surpluses or shortfalls the Town could experience if no immediate actions were taken.

Long-term financial planning is a major tool in maintaining a sound financial position. It is critical that the Town maintain its bond ratings, Moody's upgraded the Town's bond rating in June 2023 from Aa1 to Aaa and Standard and Poor's upgraded the Town's bond rating in June 2019 from AA- to AA+.

### Awards and Acknowledgements

The Government Finance Officers Association of the United States and Canada ("GFOA") awarded a Certificate of Achievement for Excellence in Financial Reporting to the Town of Bluffton for its Annual Comprehensive Financial Report for the fiscal year ended June 30, 2023. This was the sixteenth consecutive year that the Town has achieved this prestigious award. In order to be awarded a Certificate of Achievement, a government must publish an easily readable and efficiently organized Annual Comprehensive Financial Report. This report must satisfy both generally accepted accounting principles and applicable legal requirements.

A Certificate of Achievement is valid for a period of one year only. We believe that our current Annual Comprehensive Financial Report continues to meet the Certificate of Achievement Program's requirements, and we are submitting it to the GFOA to determine its eligibility for another certificate.

The preparation of this report could not be accomplished without the efficient and dedicated services of the entire Finance Department staff. Their contributions are truly appreciated.

Respectfully,



Chris Forster, MPA, CPFO, CGFM,  
Assistant Town Manager

**PRINCIPAL OFFICIALS  
FOR THE FISCAL YEAR ENDED JUNE 30, 2024**

---

**Elected Officials**

Mayor

The Honorable Larry Toomer

Council Members:

Dan Wood - Mayor Pro Tempore

Emily Burden

Bridgette Frazier

Fred Hamilton

**Appointed Officials**

Stephen Steese – Town Manager

Terry A. Finger – Town Attorney

Honorable Clifford Bush III, Chief Municipal Court Judge

Honorable James Andrew Smith, Associate Municipal Court Judge

**Senior Management**

Chris Forster

Heather Colin

Marcia Hunter

Joseph Babkiewicz

Anni Evans

Larry Beckler

Lisa Cunningham

Kim Jones

Kevin Icard

Natalie Majorkiewicz

David Nelems

Tracy 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 Projects & Watershed Resilience

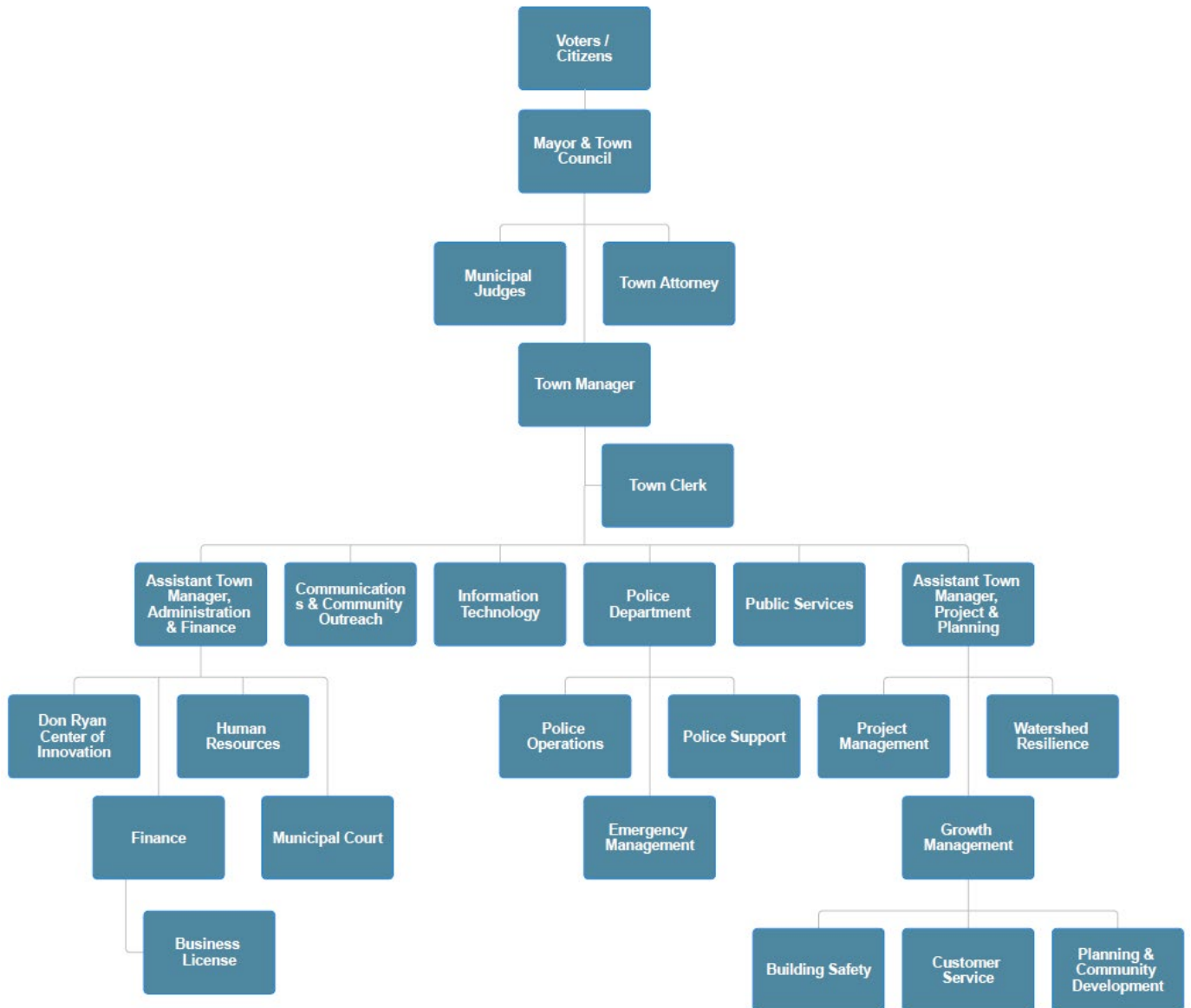
Director of Growth Management

Director of Finance

CEO, Don Ryan Center for Innovation

Chief Technology Officer

ORGANIZATIONAL CHART  
FOR THE FISCAL YEAR ENDED JUNE 30, 2024



GFOA CERTIFICATE OF ACHIEVEMENT

---



Government Finance Officers Association

Certificate of  
Achievement  
for Excellence  
in Financial  
Reporting

Presented to

**Town of Bluffton  
South Carolina**

For its Annual Comprehensive  
Financial Report  
For the Fiscal Year Ended

June 30, 2023

*Christopher P. Morrell*

Executive Director/CEO

## FINANCIAL SECTION



## INDEPENDENT AUDITOR'S REPORT

---

**Honorable Mayor and Members  
of the Town Council  
Town of Bluffton, South Carolina  
Bluffton, South Carolina**

### **Report on the Audit of the Financial Statements**

#### ***Opinions***

We have audited the accompanying financial statements of the governmental activities, the discretely presented component unit, each major fund, and the aggregate remaining fund information of the **Town of Bluffton, South Carolina** (the "Town"), as of and for the year ended June 30, 2024, and the related notes to the financial statements, which collectively comprise the Town's basic financial statements as listed in the Table of Contents.

In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities, the discretely presented component unit, each major fund, and the aggregate remaining fund information of the Town, as of June 30, 2024, and the respective changes in financial position and the respective budgetary comparisons for the General Fund and Stormwater Fund for the year then ended in accordance with accounting principles generally accepted in the United States of America.

#### ***Basis for Opinions***

We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. 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 the Town and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

#### ***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 the Town's ability to continue as a going concern for twelve months beyond the financial statement date, including any currently known information that may raise substantial doubt shortly thereafter.

---

***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 opinions. 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 and *Government 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 and *Government 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 the Town'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 the Town'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.

---

**Required Supplementary Information**

Accounting principles generally accepted in the United States of America require that the Management's Discussion and Analysis, the Schedule of Proportionate Share of the Net Pension Liability – South Carolina Retirement System, the Schedule of Proportionate Share of the Net Pension Liability – Police Officers' Retirement System, the Schedule of Contributions – South Carolina Retirement System, and the Schedule of Contributions – Police Officers' Retirement System as listed in the Table of Contents, be presented to supplement the basic financial statements. Such information is the responsibility of management and, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

**Supplementary Information**

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the Town's basic financial statements. The Combining and Individual Fund Financial Statements and Schedules, as listed in the table of contents, the Uniform Schedule of Court Fines, Assessments and Surcharges (per ACT 96) as required by the South Carolina Code of Laws, and the Schedule of Expenditures of Federal Awards as required by Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* ("Uniform Guidance") are presented for purposes of additional analysis and are not a required part of the basic financial statements. Such information is the responsibility of management and was derived from, and relates directly to, the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the Combining and Individual Fund Financial Statements and Schedules, the Uniform Schedule of Court Fines, Assessments and Surcharges (per ACT 96), and the Schedule of Expenditures of Federal Awards are fairly stated, in all material respects, in relation to the basic financial statements as a whole.

---

**Other Information**

Management is responsible for the other information included in the annual report. The other information is comprised of the introductory and statistical sections, but does not include the basic financial statements and our auditor's report thereon. Our opinions on the basic financial statements do not cover the other information, and we do not express an opinion or any form of assurance thereon.

In connection with our audit of the basic financial statements, our responsibility is to read the other information and consider whether a material inconsistency exists between the other information and the basic financial statements, or the other information otherwise appears to be materially misstated. If, based on the work performed, we conclude that an uncorrected material misstatement of the other information exists, we are required to describe it in our report.

**Other Reporting Required by Government Auditing Standards**

In accordance with *Government Auditing Standards*, we have also issued our report dated December 18, 2024, on our consideration of the Town's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Town's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Town of Bluffton, South Carolina's internal control over financial reporting and compliance.

*Mauldin & Jenkins, LLC*

Savannah, Georgia  
December 18, 2024

**MANAGEMENT'S DISCUSSION AND ANALYSIS  
JUNE 30, 2024**

As management of the Town of Bluffton, South Carolina (the "Town"), we offer readers of the Town's financial statements this narrative overview and analysis of the financial activities of the Town for the fiscal year ended June 30, 2024. We encourage readers to read the information presented here in conjunction with additional information we have furnished in our letter of transmittal, which can be found on pages i through iv of this report.

**Financial Highlights**

- The assets and deferred outflows of resources of the Town exceeded its liabilities and deferred inflows of resources at the close of the fiscal year by \$96,228,232 (*net position*). Of this amount, \$21,106,515 (unrestricted net position) may be used to meet the Town's ongoing obligations to its citizens and vendors. The net of deferred outflows to deferred inflows related to pensions was \$2,030,880, of which the majority was due to employer contributions and changes in actuarial assumptions.
- The Town's total net position increased by \$17,598,549, or 22%, for fiscal year 2024.
- As of the close of the current fiscal year, the Town's governmental funds reported combined ending fund balances of \$79,162,892, an increase of \$3,376,703. Approximately 23.7% of this total amount, or \$18,768,317, is available for spending at the Town's discretion (*unassigned fund balance*).
- At the end of the current fiscal year, the unassigned fund balance for the General Fund was \$18,768,317, or 71.1%, of total General Fund expenditures for the fiscal year.
- The Town's total long-term debt decreased by \$234,644 (0.5%) during the current fiscal year. The Town had principal payments on outstanding debt of \$2,380,462, which includes bond principal payments of \$1,731,649. The compensated absences liability increased by \$77,876.
- The Town of Bluffton's bond rating at June 30, 2024, was Aaa from Moody's and an AA+ from Standard & Poor's. Both agencies stated the high ratings reflect the growth in the tax base and a healthy financial position supported by financial policies, professional management and modest debt.

**Overview of the Financial Statements**

This Management's Discussion and Analysis ("MD&A") is intended to serve as an introduction to the Town's basic financial statements. The Town's basic financial statements consist of three components: 1) government-wide financial statements; 2) fund financial statements; and 3) notes to the financial statements. The basic financial statements present two different views of the Town through the use of government-wide statements and fund financial statements. In addition to the basic financial statements, this report contains other supplemental information that will enhance the reader's understanding of the financial condition of the Town.

**Government-wide Financial Statements** – The government-wide financial statements are designed to provide the reader with a broad overview of the Town's finances, similar in format to the financial statements of a private-sector business. The government-wide statements provide short and long-term information about the Town's financial status as a whole.

The two government-wide statements report the Town's net position and how they have changed. The net position is the difference between the Town's total assets plus deferred outflows of resources and total liabilities plus deferred inflows of resources. Measuring net position is one way to gauge the Town's financial condition.

## MANGEMENT'S DISCUSSION AND ANALYSIS

The government-wide statements consist of governmental activities of the Town and its component units. The governmental activities include most of the Town's basic services such as administrative, judicial, planning, public safety, public works, stormwater management, and community development. Property taxes and charges for services finance most of these activities. Financial information for one nonmajor component unit, the Don Ryan Center for Innovation, is reported separately from the primary government.

The Government-wide Financial Statements can be found on pages 16 and 17 of this report.

**Fund Financial Statements** – The fund financial statements provide a more detailed look at the Town's most significant activities. A fund is a grouping of related accounts that is used to maintain control over resources that have been segregated for specific activities or objectives. The Town, like other state and local governments, uses fund accounting to ensure and demonstrate compliance with finance-related legal requirements, such as the General Statutes or the Town's budget ordinance.

**Governmental Funds** – Governmental funds are used to account for essentially the same functions reported as governmental activities in the government-wide financial statements. These funds focus on how assets can readily be converted into cash flow in and out, and what monies are left at year-end that will be available for spending in the next year. Governmental funds are reported using an accounting method called modified accrual accounting, which provides a short-term spending focus. As a result, the governmental fund financial statements give the reader a detailed short-term view that helps determine if there are more or less financial resources available to finance the Town's programs. The relationship between government activities (reported in the Statement of Net Position and the Statement of Activities) and governmental funds is described in a reconciliation that is part of the fund financial statements.

Information is presented separately in the governmental fund Balance Sheet and in the governmental fund Statement of Revenues, Expenditures and Changes in Fund Balances for the General Fund, the Capital Improvements Program Fund, Debt Service Fund, Stormwater Fund, Local Accommodations Tax Fund, Hospitality Tax Fund and Projects Fund; all of which are considered to be major funds. Data from the other governmental funds are combined into a single, aggregated presentation. Individual fund data for each of these nonmajor governmental funds is provided in the form of combining statements elsewhere in this report.

The Town previously has adopted an annual budget for its General Fund, Capital Improvements Program Fund, Debt Service Fund, Stormwater Fund, Hospitality Tax Fund, and Local Accommodations Tax Fund. The budget is a legally adopted document that incorporates input from the citizens of the Town, the management of the Town and the decisions of the Council about which services to provide and how to pay for them. It also authorizes the Town to obtain funds from identified sources to finance these current period activities. The budgetary statements provided for the General Fund and Stormwater Fund and the schedules provided for the General Fund, Capital Improvements Program Fund, Debt Service Fund, Stormwater Fund, Hospitality Tax Fund, and Local Accommodations Tax Fund demonstrate how well the Town complied with the budget ordinance and whether the Town succeeded in providing the services as planned when the budget was adopted. The budgetary comparison statements and schedules use the budgetary basis of accounting and are presented using the same format, language and classifications as the Statement of Revenues, Expenditures and Changes in Fund Balances. The statements and schedules show four columns: 1) the original budget as adopted by the Council; 2) the final budget as amended by the Council; 3) the actual resources, charges to appropriations, and ending balances in the General Fund, Capital Improvements Program Fund, Debt Service Fund, Stormwater Fund, Hospitality Tax Fund, and Local Accommodations Tax Fund.



## MANGEMENT'S DISCUSSION AND ANALYSIS

---

Program Fund, Debt Service Fund, Stormwater Fund, Hospitality Tax Fund, and Local Accommodations Tax Fund; and 4) the difference or variance between the final budget and the actual resources and charges.

These basic fund financial statements and schedules can be found on pages 18 through 27 of this report.

**Notes to the Financial Statements** – The notes provide additional information that is essential to a full understanding of the data provided in the government-wide and fund financial statements. The Notes to the Financial Statements can be found on pages 28 through 59 of this report.

**Other Supplemental information** – In addition to the basic financial statements and accompanying notes, the report also presents certain supplementary information. The required supplementary information can be found on pages 60 and 61 of this report.

The combining statements referred to earlier in connection with nonmajor governmental funds are presented immediately following the required supplementary information related to pensions as other supplemental information. Community development grants for tourism are funded by State and Local Accommodations Taxes and are reviewed by the Town's Accommodations Tax Advisory Committee. The committee's recommendations are proposed to Council for final approval. Combining and Individual Fund Statements and Schedules can be found on pages 62 through 67 of this report.

## MANGEMENT'S DISCUSSION AND ANALYSIS

### Government-wide Financial Analysis

The government-wide financial statements for the fiscal year ended June 30, 2024 are prepared using the financial statement-reporting model as mandated by the Governmental Accounting Standards Board ("GASB").

**Statement of Net Position**  
**Figure 1**

	<b>Governmental Activities</b>		% Change
	<b>2024</b>	<b>2023</b>	
Current and other assets	\$ 89,284,221	\$ 84,181,550	6%
Capital assets, net	55,778,177	42,148,673	32%
Total assets	<u>145,062,398</u>	<u>126,330,223</u>	<u>15%</u>
Deferred outflows of resources related to pensions	2,438,580	2,254,677	8%
Total assets and deferred outflows of resources	<u>\$ 147,500,978</u>	<u>\$ 128,584,900</u>	<u>15%</u>
Current and other liabilities	\$ 13,032,176	\$ 11,042,902	18%
Long-term liability outstanding	19,282,072	20,367,662	-5%
Net pension liability	18,550,798	17,955,688	3%
Total liabilities	<u>50,865,046</u>	<u>49,366,252</u>	<u>3%</u>
Deferred inflows of resources related to pensions	407,700	588,965	-31%
Total liabilities and deferred inflows of resources	<u>51,272,746</u>	<u>49,955,217</u>	<u>3%</u>
Net position:			
Net investment in capital assets	39,722,238	30,557,167	30%
Restricted	35,399,479	33,080,296	7%
Unrestricted	21,106,515	14,992,220	41%
Total net position	<u>96,228,232</u>	<u>78,629,683</u>	<u>22%</u>
Total liabilities, deferred inflows of resources and net position	<u>\$ 147,500,978</u>	<u>\$ 128,584,900</u>	<u>15%</u>

As noted earlier, net position may serve over time as one useful indicator of a government's financial condition. The assets of the Town exceeded liabilities by \$96,228,232 as of June 30, 2024. The Town's overall financial position improved, and net position increased by \$17,598,549, or 22%, during fiscal year 2024.

The Town increased its current and other assets by \$5,102,671. The increase is largely attributable to investments and cash position increases in the Stormwater Fund and Hospitality Tax Fund. The 22% increase in the Town's total net position is the result of continued conservative budgeting and Town growth.

The \$1,989,274 net increase in current and other liabilities is primarily related to the increases in amounts due to other governments and accounts payable. The \$1,085,590 net decrease in the Town's long-term liabilities is mainly due to the early payoff of financed purchases and increase in bond payments.

## MANGEMENT'S DISCUSSION AND ANALYSIS

The increase in deferred outflows is due primarily to the assumption changes of \$327,236 and an increase in employer contributions subsequent to the measurement date of \$1,040,395. GASB 68 requires the collective deferred outflows and inflows arising from differences between projected and actual plan investment earnings in different measurement periods to be aggregated and included as a net collective deferred outflow or inflow. The Net Pension Liability increase is primarily due to the overall increase in the total pension liability of the plan. This resulted in an overall increase in the combined SCRS and PORS net pension liability of \$595 thousand.

The Town's restricted net position represents resources subject to external restrictions on how they may be used. The decrease of \$2.7 million from the prior year reflects a decrease of \$2.9 million in debt service, \$440 thousand decrease in tourism projects and related support, and \$714 thousand increase in capital projects.

The following table presents the Town's changes in net position for the fiscal years ended June 30, 2024 and 2023.

**Statement of Activities**  
**Figure 2**

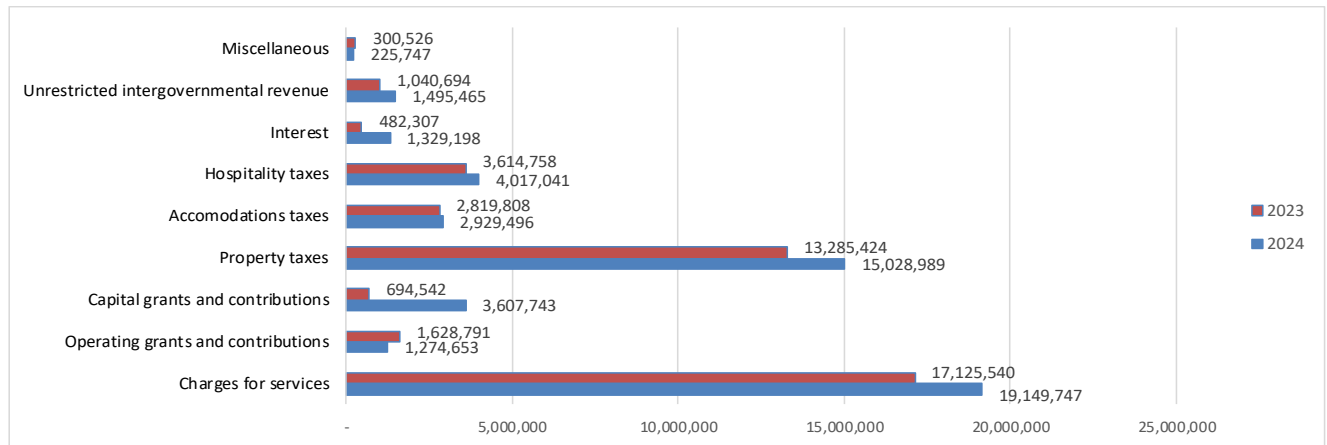
	<b>Governmental Activities</b>		
	<b>2024</b>	<b>2023</b>	<b>% Change</b>
<b>Revenues</b>			
Program revenues:			
Charges for services	\$ 19,149,747	\$ 17,125,540	12%
Operating grants and contributions	1,274,653	1,628,791	-22%
Capital grants and contributions	3,607,743	694,542	419%
General revenues:			
Property taxes	15,028,989	13,285,424	13%
Accommodations taxes	2,929,496	2,819,808	4%
Hospitality taxes	4,017,041	3,614,758	11%
Interest	1,329,198	482,307	176%
Unrestricted intergovernmental revenue	1,495,465	1,040,694	44%
Miscellaneous	225,747	300,526	-25%
Total revenue	<u>49,058,079</u>	<u>40,992,390</u>	<u>20%</u>
<b>Expenses</b>			
Current:			
Administrative	9,740,094	8,356,307	17%
Judicial	559,284	488,612	14%
Planning	2,222,881	2,060,638	8%
Building safety	1,231,910	1,089,713	13%
Police department	10,985,607	8,150,819	35%
Public works	2,205,145	2,162,371	2%
Stormwater management	1,309,369	1,209,120	8%
Project management	820,177	890,555	-8%
Community development	1,830,251	2,274,641	-20%
Interest on long-term debt	554,812	538,926	3%
Total expenses	<u>31,459,530</u>	<u>27,221,702</u>	<u>16%</u>
Change in net position	17,598,549	13,770,688	28%
Net position, beginning	78,629,683	64,858,995	21%
Net position, ending	<u>\$ 96,228,232</u>	<u>\$ 78,629,683</u>	<u>22%</u>

## MANGEMENT’S DISCUSSION AND ANALYSIS

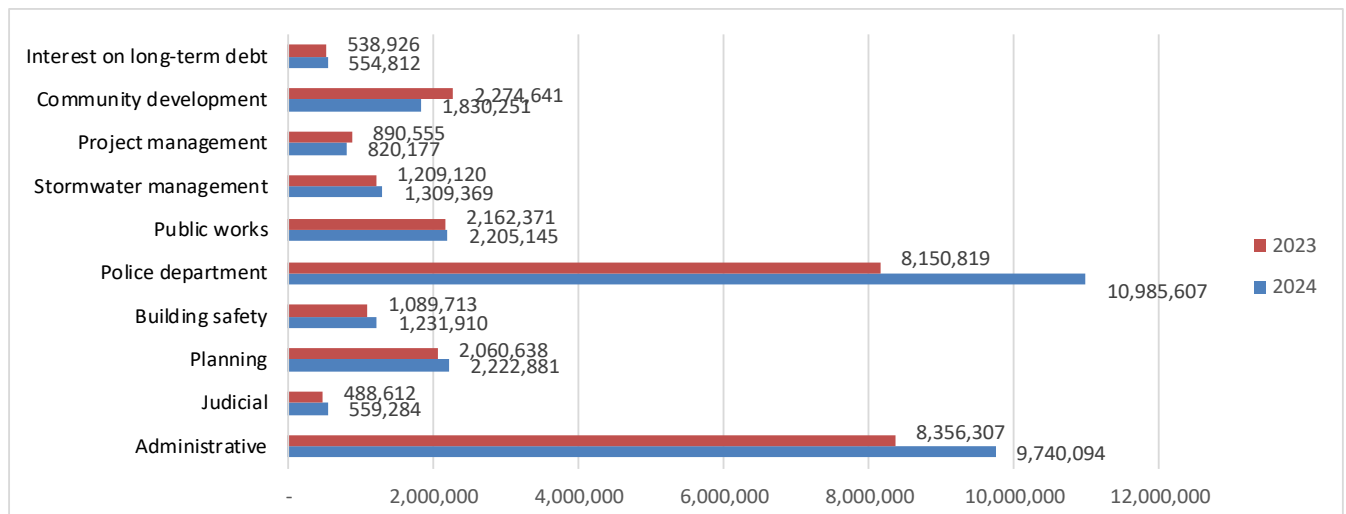
**Governmental Activities** – Governmental activities increased the Town’s net position by \$17,598,549. This increase is attributable to better than expected revenue increases, with the continued growth of the Town evident in the increase in property tax revenue, which is 30.6% of total revenue. Hospitality taxes increased as well over the prior year, accounting for 8.2% of total revenue. These factors, combined with the Town’s efforts to control General Fund spending, resulted in an increase in net position of almost \$17.6 million. Charges for services account for 39.0% of total revenue and include business licenses, franchise fees, permit fees, and development fees. All other revenue sources comprise 22.2% of all funds received by the Town.

The following charts compare fiscal years 2024 and 2023 revenues by source and expenses by program:

**Revenues by Source – Governmental Activities**  
**Figure 3**



**Expenses by Program – Governmental Activities**  
**Figure 4**



## MANGEMENT'S DISCUSSION AND ANALYSIS

Major expenses for fiscal year 2024 were associated with the Police Department (35%), Administration (31%), Community Development (6%), Public Works (7%), Project Management (3%), Planning (7%) Watershed Management (4%) functions, Building Safety (4%), and Judicial (2%). Administration expenses included costs for contracts to provide the Town services such as waste management, personnel costs and routine computer hardware and software costs. The Town infrastructure, and the Town park and open space improvements were the majority of expenditures in Project Management and Community Development.

Transfers between the funds in fiscal year 2024 increased by \$8.9 million primarily due to the increase of transfers into the Capital Improvements Fund of approximately \$7.4 million to support capital projects within the Town. The major transfer to the General Fund for fiscal year 2024 is \$2.1 million from the Hospitality Tax Fund to support tourism projects and related support personnel. Transfers In for the Capital Improvements Program Fund from the General Fund were \$2.6 million and were used to fund portions of the Fund's budgeted projects in fiscal year 2024.

### Financial Analysis of the Town's Funds

As noted earlier, the Town uses fund accounting to ensure and demonstrate compliance with finance-related legal requirements.

**Governmental Funds** – The focus of the Town's governmental funds is to provide information on near-term inflows, outflows and balances of usable resources. Such information is useful in assessing the Town's financing requirements. Specifically, unassigned fund balances can be a useful measure of a government's net resources available for spending at the end of the fiscal year.

At the end of the current fiscal year, the Town's governmental funds reported combined ending fund balances of \$79,162,892, an increase of \$3,376,703 from the prior fiscal year. Increases in property tax revenues of \$1.7 million along with increases in grants for capital related projects are the major drivers of this increase. Approximately 23.7% of total fund balance, or \$18,768,317, constitutes unassigned fund balance which is available for spending at the Town's discretion. The remainder of fund balances (\$60,394,575) are designated to indicate that they are not available for new spending. They have been designated as non-spendable (\$638,937), restricted (\$41,068,548), committed (\$13,515,007) or assigned (\$5,172,083). Significant amounts of restricted balances are due to external designations for debt service, tourism and related support programs, TIF Projects, and Stormwater Improvements Projects. Significant amounts of committed balances are due to the Council's designations for the Emergency Recovery Fund, the Equipment and Vehicle Replacement Reserves, and contract encumbrances for various capital improvements within the Town. Finally, amounts of assigned balances are due to the Town Manager and Directors designations for capital improvement purposes and various environmental preservations.

The General Fund is the chief operating fund of the Town. The total fund balance of the Town's General Fund increased \$4,399,081 during fiscal year 2024. This is driven from an increase in property tax revenues resulting from an overall increase in local market values and reassessment from the County for tax year 2023. In addition, the Town implemented a new online business license renewal software program in the spring of 2024 which led to more timely receipt of business license renewal revenues.

## MANGEMENT'S DISCUSSION AND ANALYSIS

General Fund revenues (excluding transfers in and other financing sources) for the fiscal year 2024 were \$29,229,197, an increase of over \$3 million, or 11.6%, from the previous year. Licenses and Permits totaled \$14,577,413, an increase of \$1.6 million over the prior year. MASC insurance tax collections represent the largest increase for revenues within the Licenses and Permits category with an increase of \$696 thousand, and business licenses increased \$663 thousand within this same category. Property tax revenues for the General Fund totaled \$10,319,430, an increase of \$1 million, or 10.8%, when compared to the prior year. This increase is the result of continued growth in the residential and commercial building markets adding additional taxpayers to the tax rolls coupled with the overall increase in market values.

General Fund expenditures totaled \$26,378,893, a spending increase of \$4,183,572 from the prior year or 18.8%. The increase was primarily due to increases in salaries and benefits from a 2% cost of living increase, 2% mid-year merit increase, and updates to the Police Department Step Plan, early debt retirement of financed purchases, and new software in the Finance and Information Technology departments.

At the end of the fiscal year, the unassigned fund balance of the General Fund was \$18,768,317 while the total General Fund balance was \$34,023,045. As a measure of the General Fund's liquidity, it may be useful to compare both unassigned fund balances and total fund balances to total fund expenditures. Unassigned fund balances represent 71.1% of the total General Fund expenditures, while total fund balances represent 129% of that same amount.

The Capital Improvements Program ("CIP") Fund's fund balance increased \$1.7 million during fiscal year 2024. The increase is due to more capital project outlays being covered by transfers to the fund from the General Fund, stormwater fees and hospitality taxes.

At the end of the fiscal year, the fund balance in the Debt Service Fund was \$11,798,258, an increase of \$2.5 million from the prior year. This increase is attributable to the continued residential and commercial growth in the tax increment financing ("TIF") District.

The Stormwater Utility Fund's fund balance increased \$406 thousand during fiscal year 2024. The 11% increase is reflective of the increase in revenues from the County reassessment and stormwater transfers to support capital improvement projects.

The Local Accommodations Tax Fund's fund balance increased \$430 thousand, or 16%, during fiscal year 2024. The increase is primarily due to increased revenues from increased tourism and Council's decision to not pay the quarterly 8% designated marketing services expense as was done in prior fiscal years.

The Hospitality Tax Fund's fund balance decreased \$91 thousand, or 1%, during fiscal year 2024. The decrease is due to a significant increase in transfers out to support tourism-related capital projects.

The Projects Fund had a decrease in fund balance of \$5.4 million, or 39%, over the prior year, and is due to over \$5.7 million in transfers to the CIP fund to support capital projects.

### General Fund Budgetary Highlights

During the fiscal year, the Town revised the budget on a few occasions. Generally, budget amendments fall into one of four categories: 1) amendments made to adjust the estimates used to prepare the original budget ordinance once exact information is available; 2) amendments made to recognize new funding amounts from external sources, such



## MANGEMENT'S DISCUSSION AND ANALYSIS

as federal and state grants; 3) amendments to provide budget appropriations for legal encumbrances; and (4) other increases or decreases in appropriations that become necessary throughout the year.

The General Fund Budget expenditure changes were \$1,072,224, starting at \$27,093,323, and ending at \$28,165,547.

Actual revenues for the General Fund were \$5.3 million more than the original adopted budget and \$4.7 million more than the revised budget. The Town saw a better than expected increase in property taxes, business licenses and MASC insurance tax collection. As Town growth continues, it will continue to affect these revenue classes.

Actual expenditures for the General Fund were \$1.8 million below revised budget. The favorable variance was due to delays in hiring open positions and grant expenditure delays until fiscal year 2025.

### Capital Assets and Debt Administration

**Capital Assets** – The Town's investment in capital assets for its governmental activities as of June 30, 2024 totals \$55,778,177 (net of accumulated depreciation). These assets include land, building and improvements, drainage, roads, sidewalks and trails, land improvements, machinery and equipment, and vehicles. The total increase in the Town's investment in capital assets for fiscal year 2024 was 32.3%, mainly attributable to the purchase of land on Buck Island Road and increase in Construction in Progress at year-end related to the New Riverside Barn Park project.

Capital asset transactions during the year included land acquisition at Buck Island Road, streetscape improvements in Old Town Bluffton, event space and park improvements to Oyster Factory Park, New River Trail improvements, purchase of eight vehicles, and machinery and equipment for Town-wide maintenance of assets and parks.

**Town of Bluffton's Capital Assets**  
**Figure 5**

	2024	2023
Land	\$ 20,573,165	\$ 18,066,150
Building and improvements	8,784,479	8,983,918
Drainage	1,843,131	406,488
Roads	1,819,233	2,081,674
Sidewalks and trails	2,830,192	2,617,953
Land improvements	6,215,903	3,538,838
Machinery and equipment	1,039,807	733,263
Vehicles	649,947	472,565
Lease assets	1,814,617	612,539
SBITAs	34,992	69,986
Construction in progress	10,172,711	4,565,299
Total	<u>\$ 55,778,177</u>	<u>\$ 42,148,673</u>

Additional information on the Town's capital assets can be found in Note 6 to the financial statements.

## MANGEMENT’S DISCUSSION AND ANALYSIS

**Long-term Debt** – At the end of the current fiscal year, the Town has total bond debt outstanding of \$19,843,490. Of this amount, \$7.1 million of General Obligation Debt is secured by the full faith and credit of the Town. Tax Increment Financing District bonded debt funded from incremental tax revenue represents \$10,873,418.

**Town of Bluffton’s Outstanding Debt**  
**Figure 6**

	2024	2023
General obligation bonds	\$ 7,125,000	\$ 7,525,000
Refunded TIF bonds	10,873,418	12,063,571
Leases	1,806,621	626,269
SBITAs	38,451	75,691
Financed purchases	-	319,093
Total	<u>\$ 19,843,490</u>	<u>\$ 20,609,624</u>

The Town’s debt decreased \$766,134 during the current fiscal year excluding compensated absences and the net pension liability. This was related to the early payoff of financed purchases in fiscal year 2024. State statutes limit the amount of general obligation debt a governmental entity may issue, without a referendum, to 8% of its total assessed valuation of all taxable real estate and personal property within the Town limits. The current debt limitation for the Town is \$34,178,016, of which \$27,053,016 is remaining for additional general obligation issues. At June 30, 2024, only \$7.125 million of the Town’s debt applies to this limitation.

The Town maintained a bond rating of Aaa from Moody’s Investor Service and a rating of AA+ from Standard and Poor’s Corporation at June 30, 2024. Moody’s upgraded the Town to an Aaa in June 2024 and Standard and Poor’s upgraded the town to AA+ in 2019. Both agencies have stated the high ratings reflect the growth in the tax base in recent years and a healthy financial position supported by fiscal policies, professional management and modest debt.

Additional information on the Town’s long-term debt can be found in Note 8 to the financial statements.

### Economic Factors and Next Year’s Budgets and Rates

The following key economic indicators reflect the growth and prosperity of the Town:

- Located in the heart of the Lowcountry, the Town tourism numbers are rising in Bluffton as in the neighboring communities of Hilton Head Island and Savannah, Georgia. Located on the banks of the pristine May River, the Town is home to the 20,660 acre Palmetto Bluff, an upscale award winning resort and residential development.
- The number of residential building permits and development permits decreased slightly in fiscal year 2024. This trend was anticipated for fiscal year 2024 as supply chain issues of raw materials and labor shortages were prevalent. New single-family housing starts continue to fuel the elevated growth in the Town. The number of Business Licenses issued of approximately 3,850 is a decrease over the prior year, with approximately 2,300 of these businesses being located within the Town limits.

## MANGEMENT'S DISCUSSION AND ANALYSIS

- The Town is entering the 13th year of a non-profit public/private economic development venture to operate a technology business incubator in the Town of Bluffton. The Don Ryan Center for Innovation ("DRCI") was created as a storefront technology incubator within the Town's Technology Park located at Buckwalter Place. Bluffton was the first of five such projects established in the State with Clemson University to commercialize technology and create new businesses. In 2020, the DRCI moved from its temporary location to a permanent home at Buckwalter Place within the new Southeastern Development Associates Commercial Project.
- The unemployment rate for Beaufort County was 4.6% and is slightly above the State's rate of 3.6% at June 30, 2024. Currently, no data is available specifically for the Town of Bluffton.
- The fiscal year 2025 General Fund budget is balanced at \$32,468,440, an increase of 2.4% from fiscal year 2024's revised budget. The budgeted transfer out to the CIP Fund is \$1.5 million less than in fiscal year 2024.
- The fiscal year 2025 Consolidated Municipal Budget was developed by our elected officials and the Town staff working together for the betterment of the community in delivering a balanced budget. The fiscal year 2025 budget sets a tax rate of 36.0 mills, with a projected increase in assessed values. The General Fund will receive 34.3 mills and the Debt Service Fund will receive 1.7 mills.
- The CIP Fund budget for fiscal year 2025 is \$33,268,114. The majority of these expenditures are for sewer improvements which support the improved water quality initiatives in the Buck Island/Simmons ville area and Historic District of approximately \$7.5 million, additional improvements to sidewalk and road improvements of approximately \$3.4 million, Park Development of \$11.6 million and Land Acquisition of approximately \$3 million, \$615 thousand for the restoration of the historic Squire Pope Carriage House, \$1.5 million for the Affordable Housing Project, and \$3.2 million for the Buckwalter Place Multi-County Commerce Park.
- The Debt Service Fund provides for the payment of bond principal and interest payments totaling \$2,245,714 for fiscal year 2025. This includes principal and interest payments for the Refunded TIF Bonds issued in 2014, as well as for the refunded General Obligation Bonds, Series 2020, General Obligations Bonds, Series 2020A, and the TIF Revenue Bonds issued last fiscal year.
- The Stormwater Fund appropriation for fiscal year 2025 is \$4,017,671. Operational expenditures total \$1,980,912 and transfers of \$2,036,759 to other funds balance the budget of this fund.
- The Hospitality Tax Fund was included in the budget process for the first time. The fund's budget for fiscal year 2025 is \$8,248,866 and includes \$4.1 million in hospitality tax revenues and \$4.9 million in transfers out to the CIP fund.
- Similar to the Hospitality Tax Fund, the Local Accommodations Tax Fund has been included in the budget process since FY 2024. The fund's budget is balanced at \$2,165,606 and includes tax revenues of \$1.3 million and transfers out to the CIP fund of \$1.6 million.

### Requests for Information

This report is designed to provide an overview of the Town's finances. Questions concerning any of the information found in this report or requests for additional information should be directed to:

Director of Finance and Administration  
Town of Bluffton  
20 Bridge Street  
P.O. Box 386  
Bluffton, South Carolina 29910

# TOWN OF BLUFFTON, SOUTH CAROLINA

Attac

Section XI. Item #4.

## STATEMENT OF NET POSITION JUNE 30, 2024

	<u>Primary Government</u>	<u>Component Unit</u>
	<u>Governmental</u>	<u>The Don Ryan</u>
	<u>Activities</u>	<u>Center for</u>
		<u>Innovation</u>
<b>ASSETS</b>		
Cash and cash equivalents	\$ 40,370,024	\$ 466,173
Restricted cash	25,478,739	-
Investments	17,598,193	-
Receivables, net of allowance:		
Taxes	85,259	-
Accounts	5,113,069	19,629
Due from primary government	-	46,849
Prepaid items	638,937	544
Capital assets:		
Non-depreciable	30,745,876	-
Depreciable, net of accumulated depreciation/amortization	25,032,301	-
Total assets	<u>145,062,398</u>	<u>533,195</u>
<b>DEFERRED OUTFLOWS OF RESOURCES</b>		
Pensions	2,438,580	-
Total deferred outflows of resources	<u>2,438,580</u>	<u>-</u>
<b>LIABILITIES</b>		
Accounts payable	5,921,875	123,739
Accrued interest payable	128,103	-
Salaries and benefits payable	975,172	16,015
Deposits and bonds payable	278,388	-
Unearned revenue	685,502	500
Due to component unit	46,849	-
Due to other governments	2,213,543	-
Non-current liabilities		
Due within one year	2,782,744	-
Due in more than one year	19,282,072	-
Net pension liability - due in more than one year	18,550,798	-
Total liabilities	<u>50,865,046</u>	<u>140,254</u>
<b>DEFERRED INFLOWS OF RESOURCES</b>		
Deferred refunding charge	105,581	-
Pensions	302,119	-
Total deferred inflows of resources	<u>407,700</u>	<u>-</u>
<b>NET POSITION</b>		
Net investment in capital assets	39,722,238	-
Restricted for:		
Capital projects	7,797,116	-
Tourism projects and related support	13,121,854	-
Debt service	14,459,707	-
Other purposes	20,802	-
Unrestricted	21,106,515	392,941
Total net position	<u>\$ 96,228,232</u>	<u>\$ 392,941</u>

The accompanying notes are an integral part of these financial statements.

## TOWN OF BLUFFTON, SOUTH CAROLINA

### STATEMENT OF ACTIVITIES FOR THE FISCAL YEAR ENDED JUNE 30, 2024

Functions/Programs	Expenses	Program Revenues			Net (Expenses) Revenues and Changes in Net Position	
		Charges for Services	Operating Grants and Contributions	Capital Grants and Contributions	Primary Government	Component Unit
					Governmental Activities	Don Ryan Center for Innovation
Governmental activities:						
Administrative	\$ 9,740,094	\$ 12,535,891	\$ -	\$ -	\$ 2,795,797	\$ -
Judicial	559,284	769,864	-	-	210,580	-
Planning	2,222,881	742,879	-	-	(1,480,002)	-
Building safety	1,231,910	1,953,582	-	-	721,672	-
Police department	10,985,607	233,522	1,274,653	-	(9,477,432)	-
Public works	2,205,145	-	-	-	(2,205,145)	-
Stormwater management	1,309,369	2,607,109	-	-	1,297,740	-
Project management	820,177	-	-	3,607,743	2,787,566	-
Community development	1,830,251	306,900	-	-	(1,523,351)	-
Interest on long-term debt	554,812	-	-	-	(554,812)	-
Total governmental activities	<u>31,459,530</u>	<u>19,149,747</u>	<u>1,274,653</u>	<u>3,607,743</u>	<u>(7,427,387)</u>	<u>-</u>
Total Primary Government	<u>\$ 31,459,530</u>	<u>\$ 19,149,747</u>	<u>\$ 1,274,653</u>	<u>\$ 3,607,743</u>	<u>(7,427,387)</u>	<u>-</u>
<b>Component Unit</b>						
Don Ryan Center for Innovation	<u>\$ 476,768</u>	<u>\$ 13,875</u>	<u>\$ 908,715</u>	<u>\$ -</u>	-	445,822
General revenues:						
Property, including fee in lieu of taxes					15,028,989	-
Accommodations taxes					2,929,496	-
Hospitality taxes					4,017,041	-
Interest income					1,329,198	5,520
Unrestricted revenue from use of money and property					1,495,465	-
Miscellaneous revenues					225,747	-
Total general revenues					<u>25,025,936</u>	<u>5,520</u>
Change in net position					<u>17,598,549</u>	<u>451,342</u>
Net position, beginning of year					<u>78,629,683</u>	<u>(58,401)</u>
Net position, end of year					<u>\$ 96,228,232</u>	<u>\$ 392,941</u>

The accompanying notes are an integral part of these financial statements.

# TOWN OF BLUFFTON, SOUTH CAROLINA

Attac

Section XI. Item #4.

## BALANCE SHEET GOVERNMENTAL FUNDS JUNE 30, 2024

	General Fund	Capital Improvement Programs Fund	Debt Service Fund	Stormwater Fund
<b>ASSETS</b>				
Cash and cash equivalents	\$ 22,275,941	\$ 1,861,771	\$ -	\$ -
Restricted cash and cash equivalents	593,660	466,033	11,400,963	6,708,986
Investments	10,365,606	-	-	-
Property taxes receivable, net	84,859	-	400	-
Other receivables	2,578,797	1,280,016	-	40,338
Prepaid assets	638,937	-	-	-
Due from other funds	17,555,988	13,402,356	3,580,655	1,031,895
Total assets	<u>\$ 54,093,788</u>	<u>\$ 17,010,176</u>	<u>\$ 14,982,018</u>	<u>\$ 7,781,219</u>
<b>TOTAL LIABILITIES AND FUND BALANCES</b>				
<b>LIABILITIES</b>				
Accounts payable	\$ 1,266,623	\$ 3,639,231	\$ -	\$ 109,102
Salaries and benefits payable	941,172	-	-	34,000
Deposits and bonds payable	278,388	-	-	-
Due to other funds	14,647,208	4,248,453	3,183,760	3,619,155
Due to component unit	46,849	-	-	-
Due to other governments	2,205,001	8,542	-	-
Unearned revenue	685,502	-	-	-
Total liabilities	<u>20,070,743</u>	<u>7,896,226</u>	<u>3,183,760</u>	<u>3,762,257</u>
<b>FUND BALANCES</b>				
Non-spendable	638,937	-	-	-
Restricted	76,263	5,091,867	11,798,258	4,018,962
Committed	13,389,528	-	-	-
Assigned	1,150,000	4,022,083	-	-
Unassigned	18,768,317	-	-	-
Total fund balances	<u>34,023,045</u>	<u>9,113,950</u>	<u>11,798,258</u>	<u>4,018,962</u>
Total liabilities and fund balances	<u>\$ 54,093,788</u>	<u>\$ 17,010,176</u>	<u>\$ 14,982,018</u>	<u>\$ 7,781,219</u>

The accompanying notes are an integral part of these financial statements.



Local Accommodations Tax Fund	Hospitality Tax Fund	Projects Fund	Nonmajor Governmental Funds	Total Governmental Funds
\$ 2,799,445	\$ 11,578,980	\$ -	\$ 1,853,887	\$ 40,370,024
-	-	6,280,294	28,803	25,478,739
-	-	7,232,587	-	17,598,193
-	-	-	-	85,259
319,264	436,366	-	458,288	5,113,069
-	-	-	-	638,937
1,765,618	1,129,834	635,616	75,737	39,177,699
<u>\$ 4,884,327</u>	<u>\$ 13,145,180</u>	<u>\$ 14,148,497</u>	<u>\$ 2,416,715</u>	<u>\$ 128,461,920</u>
\$ -	\$ -	\$ -	\$ 906,919	\$ 5,921,875
-	-	-	-	975,172
-	-	-	-	278,388
1,690,224	5,636,478	5,817,979	334,442	39,177,699
-	-	-	-	46,849
-	-	-	-	2,213,543
-	-	-	-	685,502
<u>1,690,224</u>	<u>5,636,478</u>	<u>5,817,979</u>	<u>1,241,361</u>	<u>49,299,028</u>
-	-	-	-	638,937
3,068,624	7,508,702	8,330,518	1,175,354	41,068,548
125,479	-	-	-	13,515,007
-	-	-	-	5,172,083
-	-	-	-	18,768,317
<u>3,194,103</u>	<u>7,508,702</u>	<u>8,330,518</u>	<u>1,175,354</u>	<u>79,162,892</u>
<u>\$ 4,884,327</u>	<u>\$ 13,145,180</u>	<u>\$ 14,148,497</u>	<u>\$ 2,416,715</u>	<u>\$ 128,461,920</u>

# TOWN OF BLUFFTON, SOUTH CAROLINA

## RECONCILIATION OF THE GOVERNMENTAL FUNDS BALANCE SHEET TO THE STATEMENT OF NET POSITION JUNE 30, 2024

Amounts reported for governmental activities in the Statement of Net Position are different because of the following:

Total governmental fund balances	\$ 79,162,892
----------------------------------	---------------

Capital assets used in governmental activities are not financial resources and, therefore, are not reported in the government funds:

Cost of assets	\$ 71,204,168	
Accumulated depreciation	<u>(15,425,991)</u>	
		55,778,177

Deferred outflows of resources related to the Town's pension plan do not consume current financial resources and, therefore, are not reported in the funds.	2,438,580
---	-----------

Long-term liabilities, including bonds payable and accrued interest, are not due and payable in the current period and, therefore, are not reported in the funds:

Net pension liabilities	\$ (18,550,798)	
Compensated absences payable	(1,323,146)	
Accrued interest payable	(128,103)	
Leases	(1,806,621)	
Subscription-based IT arrangements	(38,451)	
Revenue bonds	(10,873,418)	
Deferred refunding charges	(105,581)	
General obligation bonds and bond premiums	<u>(8,023,180)</u>	
		(40,849,298)

Deferred inflows of resources related to the Town's pension plan are acquisitions of net position applicable to future periods and, therefore, are not reported in the funds.	<u>(302,119)</u>
---	------------------

Net position of governmental activities	<u>\$ 96,228,232</u>
---	----------------------

The accompanying notes are an integral part of these financial statements.

# TOWN OF BLUFFTON, SOUTH CAROLINA

Attac

Section XI. Item #4.

## STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES GOVERNMENTAL FUNDS FOR THE FISCAL YEAR ENDED JUNE 30, 2024

	General Fund	Capital Improvement Programs Fund	Debt Service Fund	Stormwater Fund	Local Accommodations Tax Fund
<b>Revenues</b>					
Property taxes	\$ 10,319,430	\$ -	\$ 4,709,559	\$ -	\$ -
Hospitality and accommodations taxes	-	-	-	-	1,830,195
Licenses and permits	14,577,413	306,900	370,800	-	-
Stormwater utility fees	-	-	-	2,607,109	-
Grants and entitlements	591,810	3,607,743	-	-	-
Intergovernmental	1,180,446	626,100	-	-	-
Service revenues	876,283	-	-	-	-
Fees and fines	769,864	-	-	-	-
Interest income	705,948	3,530	118,324	-	36,262
Miscellaneous	208,003	16,771	-	973	-
Total revenues	29,229,197	4,561,044	5,198,683	2,608,082	1,866,457
<b>Expenditures</b>					
Current:					
Legislative	393,667	-	-	-	-
Economic development	1,149,423	-	-	-	-
Executive	1,450,220	-	-	-	-
Human resources	546,001	-	-	-	-
Non-departmental	3,003,637	-	-	-	-
Finance	1,003,117	-	-	-	-
Municipal court	92,714	-	-	-	-
Municipal judges	464,779	-	-	-	-
Information technology	1,838,044	-	-	-	-
Facilities and asset management	2,069,556	-	-	-	-
Stormwater management	-	-	-	1,244,875	-
Project management	786,836	-	-	-	-
Growth management	250,564	-	-	-	-
Planning and environmental sustainability	1,470,971	-	-	-	-
Building safety	915,619	-	-	-	-
Police	10,315,738	-	-	-	-
Community development	-	-	-	-	-
Capital outlay	-	15,609,580	-	27,050	-
Debt service:					
Principal retirement	589,044	-	1,590,153	59,769	-
Interest	38,963	-	655,561	6,002	-
Total expenditures	26,378,893	15,609,580	2,245,714	1,337,696	-
Excess (deficiency) of revenues over (under) expenditures	2,850,304	(11,048,536)	2,952,969	1,270,386	1,866,457
<b>Other financing sources (uses)</b>					
Transfers in	2,714,352	12,747,910	293,800	-	-
Transfers out	(2,638,407)	-	(781,387)	(864,724)	(1,436,131)
Leases	1,472,832	-	-	-	-
Total other financing sources (uses)	1,548,777	12,747,910	(487,587)	(864,724)	(1,436,131)
Net change in fund balances	4,399,081	1,699,374	2,465,382	405,662	430,326
<b>Fund balances, beginning of year</b>	29,623,964	7,414,576	9,332,876	3,613,300	2,763,777
<b>Fund balances, end of year</b>	\$ 34,023,045	\$ 9,113,950	\$ 11,798,258	\$ 4,018,962	\$ 3,194,103

The accompanying notes are an integral part of these financial statements.

Hospitality Tax Fund	Projects Fund	Nonmajor Governmental Funds	Total Governmental Funds
\$ -	\$ -	\$ -	\$ 15,028,989
4,017,041	-	1,099,301	6,946,537
-	-	-	15,255,113
-	-	-	2,607,109
-	-	962	4,200,515
-	-	-	1,806,546
-	-	10,650	886,933
-	-	1,528	771,392
116,449	325,864	22,821	1,329,198
-	-	-	225,747
4,133,490	325,864	1,135,262	49,058,079
-	-	-	393,667
-	-	-	1,149,423
-	-	-	1,450,220
-	-	-	546,001
-	-	-	3,003,637
-	-	-	1,003,117
-	-	-	92,714
-	-	-	464,779
-	-	-	1,838,044
-	-	-	2,069,556
-	-	-	1,244,875
-	-	-	786,836
-	-	-	250,564
-	-	-	1,470,971
-	-	-	915,619
-	-	-	10,315,738
-	-	1,582,325	1,582,325
-	-	-	15,636,630
-	-	-	2,238,966
-	-	-	700,526
-	-	1,582,325	47,154,208
4,133,490	325,864	(447,063)	1,903,871
-	-	-	15,756,062
(4,224,174)	(5,732,524)	(78,715)	(15,756,062)
-	-	-	1,472,832
(4,224,174)	(5,732,524)	(78,715)	1,472,832
(90,684)	(5,406,660)	(525,778)	3,376,703
7,599,386	13,737,178	1,701,132	75,786,189
\$ 7,508,702	\$ 8,330,518	\$ 1,175,354	\$ 79,162,892

TOWN OF BLUFFTON, SOUTH CAROLINA

RECONCILIATION OF THE STATEMENT OF REVENUES, EXPENDITURES  
AND CHANGES IN FUND BALANCES OF GOVERNMENTAL FUNDS  
TO THE STATEMENT OF ACTIVITIES  
FOR THE FISCAL YEAR ENDED JUNE 30, 2024

Net change in fund balances - total governmental funds		\$	3,376,703	
<p>Governmental funds report capital outlays as expenditures. However, in the Statement of Activities, the cost of those assets is allocated over their estimated useful lives as depreciation expense. This is the amount by which capital outlay exceeded depreciation in the current period.</p>				
Capital outlay		\$	15,388,704	
Depreciation expense			(1,685,453)	
				13,703,251
<p>In the Statement of Activities, the gain or loss on disposal of capital assets is reported. Conversely, governmental funds report only proceeds from disposal of capital assets. Thus, the change in net position differs from the change in fund balance by the net book value of the capital assets sold or disposed.</p>				
				(73,747)
<p>The issuance of long-term debt (e.g., bonds, notes, leases) provides current financial resources to governmental funds, while the repayment of the principal of long-term debt consumes the current financial resources of governmental funds. Neither transaction, however, has any effect on net position.</p>				
Debt issuance		\$	(1,472,832)	
Repayment of debt			2,238,966	
				766,134
<p>Pension expense that is related to net pension liability as recorded in the Statement of Activities is based on the Town's proportionate share of pension expense of the retirement system as a whole, whereas pension expense recorded in the funds is based on the use of financial resources (e.g., required contributions). Thus, the change in net position differs from the change in fund balance by the amount by which the Town's proportionate share of pension expense exceeds actual contributions.</p>				
				(241,630)
<p>Some expenses reported in the Statement of Activities do not require the use of current financial resources and, therefore, are not reported as expenditures in the governmental funds. The details are as follows:</p>				
Compensated absences:				
Current year		\$	(1,323,146)	
Prior year			1,245,270	
Amortization of premiums and deferred refunding charges			153,184	
Accrued interest expense:				
Current year			(128,103)	
Prior year			120,633	
				67,838
Change in net position of governmental activities		\$	17,598,549	

The accompanying notes are an integral part of these financial statements.

# TOWN OF BLUFFTON, SOUTH CAROLINA

## STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES - BUDGET AND ACTUAL - GAAP BASIS GENERAL FUND FOR THE FISCAL YEAR ENDED JUNE 30, 2024

	Budget		Actual	Variance With Final Budget
	Original	Final		
<b>Revenues</b>				
Property taxes	\$ 8,729,543	\$ 9,292,646	\$ 10,319,430	\$ 1,026,784
Licenses and permits	12,166,009	12,166,009	14,577,413	2,411,404
Intergovernmental	2,208,767	2,208,767	1,772,256	(436,511)
Service revenues	586,304	586,304	876,283	289,979
Fees and fines	115,000	115,000	769,864	654,864
Miscellaneous	145,000	145,000	913,951	768,951
Total revenues	23,950,623	24,513,726	29,229,197	4,715,471
<b>Expenditures</b>				
Current:				
Legislative	421,005	446,290	393,667	52,623
Economic development	884,919	884,919	1,149,423	(264,504)
Executive	1,385,979	1,494,879	1,450,220	44,659
Human resources	545,122	647,972	546,001	101,971
Non-departmental	3,297,784	3,545,207	3,003,637	541,570
Finance	1,171,083	1,171,083	1,003,117	167,966
Municipal court	105,848	105,848	92,714	13,134
Municipal judges	485,421	485,421	464,779	20,642
Information technology	2,062,769	2,352,769	1,838,044	514,725
Facilities and asset management	2,152,645	2,152,645	2,069,556	83,089
Project management	1,055,296	971,296	786,836	184,460
Growth management	286,962	286,962	250,564	36,398
Planning and environmental sustainability	1,510,569	1,576,938	1,470,971	105,967
Building safety	1,004,155	1,027,786	915,619	112,167
Police	10,195,439	10,486,274	10,315,738	170,536
Debt service:				
Principal retirement	521,509	522,440	589,044	(66,604)
Interest	6,818	6,818	38,963	(32,145)
Total expenditures	27,093,323	28,165,547	26,378,893	1,786,654
Excess (deficiency) of revenues over (under) expenditures	(3,142,700)	(3,651,821)	2,850,304	6,502,125
<b>Other financing sources (uses)</b>				
Transfers in	5,725,436	7,194,557	2,714,352	(4,480,205)
Transfers out	(2,582,736)	(3,542,736)	(2,638,407)	904,329
Leases	-	-	1,472,832	1,472,832
Total other financing sources, net	3,142,700	3,651,821	1,548,777	(2,103,044)
Net change in fund balances	-	-	4,399,081	4,399,081
<b>Fund balances, beginning of year</b>	29,623,964	29,623,964	29,623,964	-
<b>Fund balances, end of year</b>	\$ 29,623,964	\$ 29,623,964	\$ 34,023,045	\$ 4,399,081

The accompanying notes are an integral part of these financial statements.



# TOWN OF BLUFFTON, SOUTH CAROLINA

## STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES - BUDGET AND ACTUAL - GAAP BASIS STORMWATER FUND FOR THE FISCAL YEAR ENDED JUNE 30, 2024

	Budget		Actual	Variance With Final Budget
	Original	Final		
<b>Revenues</b>				
Stormwater utility fees	\$ 2,581,205	\$ 2,581,205	\$ 2,607,109	\$ 25,904
Miscellaneous	-	-	973	973
Total revenues	<u>2,581,205</u>	<u>2,581,205</u>	<u>2,608,082</u>	<u>26,877</u>
<b>Expenditures</b>				
Stormwater management	1,500,346	1,524,072	1,244,875	279,197
Capital outlay	-	26,640	27,050	(410)
Debt service:				
Principal retirement	-	-	59,769	(59,769)
Interest	-	-	6,002	(6,002)
Total expenditures	<u>1,500,346</u>	<u>1,550,712</u>	<u>1,337,696</u>	<u>213,016</u>
Excess of revenues over expenditures	<u>1,080,859</u>	<u>1,030,493</u>	<u>1,270,386</u>	<u>239,893</u>
<b>Other financing sources (uses)</b>				
Transfers in	619,907	804,814	-	(804,814)
Transfers out	(1,700,766)	(1,835,307)	(864,724)	970,583
Total other financing uses, net	<u>(1,080,859)</u>	<u>(1,030,493)</u>	<u>(864,724)</u>	<u>165,769</u>
Net change in fund balances	<u>-</u>	<u>-</u>	<u>405,662</u>	<u>405,662</u>
<b>Fund balances, beginning of year</b>	<u>3,613,300</u>	<u>3,613,300</u>	<u>3,613,300</u>	<u>-</u>
<b>Fund balances, end of year</b>	<u>\$ 3,613,300</u>	<u>\$ 3,613,300</u>	<u>\$ 4,018,962</u>	<u>\$ 405,662</u>

The accompanying notes are an integral part of these financial statements.

# TOWN OF BLUFFTON, SOUTH CAROLINA

## STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES - BUDGET AND ACTUAL - GAAP BASIS LOCAL ACCOMMODATIONS TAX FUND FOR THE FISCAL YEAR ENDED JUNE 30, 2024

	Budget		Actual	Variance With Final Budget
	Original	Final		
<b>Revenues</b>				
Accommodations taxes	\$ 1,594,000	\$ 1,594,000	\$ 1,830,195	\$ 236,195
Interest income	3,500	3,500	36,262	32,762
Total revenues	1,597,500	1,597,500	1,866,457	268,957
<b>Other financing sources (uses)</b>				
Transfers in	294,490	1,700,798	-	(1,700,798)
Transfers out	(1,891,990)	(3,298,298)	(1,436,131)	1,862,167
Total other financing uses, net	(1,597,500)	(1,597,500)	(1,436,131)	161,369
Net change in fund balances	-	-	430,326	430,326
<b>Fund balances, beginning of year</b>	2,763,777	2,763,777	2,763,777	-
<b>Fund balances, end of year</b>	<u>\$ 2,763,777</u>	<u>\$ 2,763,777</u>	<u>\$ 3,194,103</u>	<u>\$ 430,326</u>

The accompanying notes are an integral part of these financial statements.

# TOWN OF BLUFFTON, SOUTH CAROLINA

## STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES - BUDGET AND ACTUAL - GAAP BASIS HOSPITALITY TAX FUND FOR THE FISCAL YEAR ENDED JUNE 30, 2024

	Budget		Actual	Variance With Final Budget
	Original	Final		
<b>Revenues</b>				
Hospitality taxes	\$ 3,778,036	\$ 3,778,036	\$ 4,017,041	\$ 239,005
Interest income	10,000	10,000	116,449	106,449
Total revenues	<u>3,788,036</u>	<u>3,788,036</u>	<u>4,133,490</u>	<u>345,454</u>
<b>Other financing sources (uses)</b>				
Transfers in	3,679,020	4,704,916	-	(4,704,916)
Transfers out	(7,467,056)	(8,492,952)	(4,224,174)	4,268,778
Total other financing uses, net	<u>(3,788,036)</u>	<u>(3,788,036)</u>	<u>(4,224,174)</u>	<u>(436,138)</u>
Net change in fund balances	<u>-</u>	<u>-</u>	<u>(90,684)</u>	<u>(90,684)</u>
<b>Fund balances, beginning of year</b>	<u>7,599,386</u>	<u>7,599,386</u>	<u>7,599,386</u>	<u>-</u>
<b>Fund balances, end of year</b>	<u>\$ 7,599,386</u>	<u>\$ 7,599,386</u>	<u>\$ 7,508,702</u>	<u>\$ (90,684)</u>

The accompanying notes are an integral part of these financial statements.

## NOTES TO FINANCIAL STATEMENTS

## NOTES TO FINANCIAL STATEMENTS

### NOTE 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

The basic financial statements of the Town of Bluffton, South Carolina (the "Town") have been prepared in conformity with accounting principles generally accepted in the United States of America ("GAAP") as applied to government units. The Governmental Accounting Standards Board ("GASB") is the accepted standard-setting body for establishing governmental accounting and reporting principles. The more significant of the Town's accounting policies are described in the paragraphs below.

#### A. Reporting Entity

The Town, a political subdivision of the State of South Carolina, was incorporated in 1852. The Town is a municipal corporation governed by an elected five-member Council. The Town operates under a Council-Manager form of government. The Town provides a range of services to its citizens including police protection, sanitation, public improvements, parks, recreation, cultural, economic development, planning, municipal court, permitting and general administration.

As required by GAAP, the basic financial statements present the Town's financial information with its component units. The primary criterion for determining inclusion or exclusion of a legally separate entity (component unit) is financial accountability which is presumed to exist if the Town both appoints a voting majority of the entity's governing body, and either: 1) the Town is able to impose its will on the entity, or 2) there is a potential for the entity to provide specific financial benefits to, or impose specific financial burdens on, the Town. If either or both of the foregoing conditions are not met, the entity could still be considered a component unit if it is fiscally dependent on the Town. In order to be fiscally independent, an entity must have the authority to do all of the following: a) determine its budget without the Town having the authority to approve or modify the budget; b) levy taxes or set rates or charges without approval by the Town; and c) issue bonded debt without approval by the Town.

Finally, an entity could be a component unit even if it met all the conditions for fiscal independence described above if excluding it would cause the Town's basic financial statements to be misleading or incomplete. Blended component units, although legally separate entities are, in substance, part of the government's operations and data from these units are combined with data of the primary government. Discretely presented component units, on the other hand, are reported in separate columns in the basic financial statements to emphasize they are legally separate from the Town. Based on the criteria above, the Town has one discretely presented component unit as detailed below; the Town does not have any blended component units. The discretely presented component unit was deemed such because the Town appoints a voting majority of the component unit governing board and the Town can impose its will on the component unit, however, it is legally separate.

## NOTES TO FINANCIAL STATEMENTS

---

### NOTE 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

#### A. Reporting Entity (Continued)

The Don Ryan Center for Innovation ("DRCI") was established in November of 2011, and was formed for charitable purposes including, but not limited to, the specific and primary purpose of providing small technology start up and development resulting in expanded employment, economic prosperity and business opportunities for businesses and residents of the Town. The Town shall have the right to vote on: the election and removal of directors of the eleven member Board of Directors, the disposition of the corporation's assets, and any election to dissolve the corporation. The DRCI shall submit an annual budget to the Town. The Town has hired and employs the Chief Executive Officer of the DRCI. Separate statements are not prepared but additional financial information can be obtained from:

Don Ryan Center for Innovation  
P.O. Box 2277  
Bluffton, South Carolina 29910

#### B. Government-wide and Fund Financial Statements

##### *Government-wide Statements*

The government-wide financial statements (i.e., the Statement of Net Position and the Statement of Activities) report information on all of the non-fiduciary activities of the primary government. All fiduciary activities are reported only in the fund financial statements. For the most part, the effect of interfund activity has been removed from these statements. Governmental activities normally are supported by taxes and intergovernmental revenues. The primary government is reported separately from certain legally separate component units for which the primary government is financially accountable, when applicable.

The Statement of Activities demonstrates the degree to which the direct expenses of a given function or segment are offset by program revenues. Direct expenses are those that are clearly identifiable with a specific function or segment.

Program revenues include: 1) charges to those who purchase, use, or directly benefit from goods, services, or privileges provided by a given function or segment, and 2) grants and contributions that are restricted to meeting the operational or capital requirements of a particular function or segment. Taxes and other items not properly included among program revenues are reported instead as general revenues.

Separate financial statements are provided for governmental funds and fiduciary funds, even though the latter are excluded from the government-wide financial statements. Major individual governmental funds and major individual proprietary funds are reported as separate columns in the fund financial statements. The Town does not have any proprietary funds.

NOTES TO FINANCIAL STATEMENTS

NOTE 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

B. Government-Wide and Fund Financial Statements (Continued)

Major Funds

The Town reports the following major governmental funds:

**General Fund** – The General Fund is the primary operating fund of the Town. It is used to account for all financial resources except those to be accounted for in another fund.

**Capital Improvement Programs Fund – Capital Projects Fund** – This 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.

**Debt Service Fund** – This fund is used for accumulating resources for the repayment of interest and principal on tax increment bonds and general obligation bonds.

**Stormwater Fund** – This fund is used to account for the stormwater utility fees collected by and distributed to the municipalities by the County for use in the Town’s Stormwater Management Program and related Capital improvement Projects.

**Hospitality Tax Fund** – This fund is used to account for the local hospitality tax fees collected by the Town for use in tourism-related expenditures and related Capital Improvement Projects.

**Local Accommodations Tax Fund** – This fund is used to account for the local accommodations taxes collected by the Town for use in tourism-related expenditures and related Capital Improvement Projects.

**Projects Fund – Capital Projects Fund** – This fund is used to account for and report the proceeds from incremental taxes charged to individuals that are restricted for expenditures related to improvements to real property within the redevelopment property area.

Nonmajor Funds

In addition, the Town reports the following fund types:

The *Special Revenue Funds* account for revenue sources that are legally restricted to expenditures for specific purposes (not including expendable trusts or major capital projects) such as grants, accommodations taxes and other special purpose fees.



## NOTES TO FINANCIAL STATEMENTS

### NOTE 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

#### C. Measurement Focus and Basis of Accounting

The accounting and financial reporting treatment is determined by the applicable measurement focus and basis of accounting. Measurement focus indicates the type of resources being measured, such as current financial resources or economic resources. The basis of accounting indicates the timing of transactions or events for recognition in the financial statements.

The government-wide financial statements are reported using the economic resources measurement focus and the accrual basis of accounting. Revenues are recorded when earned and expenses are recorded when a liability is incurred, regardless of the timing of related cash flows. Property taxes are recognized as revenues in the year for which they are levied. Revenue from grants, entitlements and donations are recognized as revenue as soon as all eligibility requirements imposed by the provider have been met. State-levied locally shared taxes are recognized as revenue in the year appropriated by the state.

Governmental fund financial statements are reported using the current financial resources measurement focus and the modified accrual basis of accounting. Revenues are recognized when they are both measurable and available. Revenues are considered to be available when they are collectible within the current period or soon enough thereafter to pay liabilities of the current period. The Town considers revenues to be available if they are collected within 60 days of the end of the current fiscal period. Revenues are considered to be measurable if the amount is known or reasonably estimable at year-end. The following revenue sources are deemed both measurable and available if collected within 60 days of year-end: delinquent property taxes, investment earnings, fines and forfeitures, state-levied locally shared taxes, insurance taxes, certain charges for services such as sanitation fees, and grant revenues for which all eligibility requirements imposed by the provider have been met. Permits, vehicle and some franchise taxes, licenses, and miscellaneous revenues, although they may be available within 60 days of year-end, are considered to be measurable only when cash is received by the Town.

Expenditures generally are recorded when a liability is incurred, as under accrual accounting. However, debt service expenditures, including lease liabilities, as well as expenditures related to compensated absences and claims and judgments, are recorded only when payment is due. General capital asset acquisitions, including entering into contracts giving the Town the right to use leased assets, are reported as expenditures in governmental funds.

Issuance of long-term debt and financing through leases and subscription-based information technology agreements ("SBITAs") are reported as other financing sources.

## NOTES TO FINANCIAL STATEMENTS

### NOTE 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

#### D. Budgets and Budgetary Accounting

Town Council at the department level determines the legal level of control. The Town Manager is authorized by the budget ordinance to make transfers of any amounts within the General Fund; however, Town Council must approve any revisions that increase total expenditures of any fund.

Budgets, as reported in the financial statements, are as originally passed by ordinance and subsequently amended. A formalized budget for the Hospitality Tax Fund was not passed. These funds are transferred to Capital Projects Funds for tourism-related capital improvement projects approved by the Council. All annual budget appropriations lapse at fiscal year-end. The Town follows a budget calendar in establishing the budgets for the next year ensuring the following criteria is met:

1. Prior to the second week in June, the Town Manager submits to the Town Council, a proposed operating budget for the General Fund, Capital Improvement Programs Fund, Debt Service Fund, and Stormwater Fund for the next fiscal year commencing the following July 1. The budgets for the aforementioned funds are prepared in accordance with GAAP. The budgets include estimated expenditures and estimated sources of revenue.
2. A public hearing is scheduled and conducted to obtain taxpayer comments.
3. Prior to June 30, Town Council adopts the budget ordinance.

#### E. Encumbrances

Encumbrance accounting, under which purchase orders, contracts and other commitments for the expenditure of monies are recorded in order to reserve that portion of the applicable appropriation, is employed as an extension of formal budgetary integration for the General Fund, Special Revenue Funds, Debt Service and Capital Projects Funds. Encumbrances are recorded when purchase orders are issued, but are not considered expenditures until liabilities for payments are incurred. Encumbrances for outstanding purchase orders do not lapse at year-end.

#### F. Deposits and Investments

For purposes of this report, the Town considers both restricted and unrestricted demand deposits, money market accounts and certificates of deposit with original maturities of three months or less from the date of purchase to be cash equivalents. The Town maintains cash and cash equivalents in two banks, which are members of the Federal Deposit Insurance Corporation ("FDIC"). Investments for the government are reported at fair value.

NOTES TO FINANCIAL STATEMENTS

NOTE 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

G. Prepaid Items

Certain payments to vendors reflect costs applicable to future accounting periods and are reported as prepaid items. The cost of prepaid items is accounted for using the consumption method.

H. Capital Assets

Purchased or constructed capital assets are reported at cost or estimated historical cost. Minimum capitalization costs are \$5,000 for all categories except roads, buildings and computer software which is \$50,000. Donated capital assets are recorded at acquisition value. The cost of normal maintenance and repairs that do not add to the value of the asset or materially extend assets' lives are not capitalized.

Capital assets and right-to-use leased assets of the Town are depreciated/amortized on the straight-line basis over the following estimated useful lives:

Asset	Years
Buildings and improvements	10 – 35
Drainage	25
Roads	20
Land improvements	10 – 20
Sidewalks and trails	20 – 30
Machinery and equipment	5 – 15
Vehicles	5
Right-to-use leased vehicles	3 – 5

I. Leases

Lessee

The Town is a lessee for noncancellable leases of vehicles. The Town recognizes a lease liability and an intangible right-to-use lease asset in the government-wide financial statements. The Town recognizes lease liabilities with an initial, individual value of \$5,000 or more.

At the commencement of a lease, the Town initially measures the lease liability at the present value of payments expected to be made during the lease term. Subsequently, the lease liability is reduced by the principal portion of lease payments made. The lease asset is initially measured as the initial amount of the lease liability, adjusted for lease payments made at or before the lease commencement date, plus certain initial direct costs. Subsequently, the lease asset is amortized on a straight-line basis over its useful life.

## NOTES TO FINANCIAL STATEMENTS

---

### NOTE 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

#### I. Leases (Continued)

##### *Lessee (Continued)*

Key estimates and judgments related to leases include how the Town determines: 1) the discount rate it uses to discount the expected lease payments to present value, 2) lease term, and 3) lease payments:

- The Town uses the interest rate charged by the lessor as the discount rate. When the interest rate charged by the lessor is not provided, the Town generally uses its estimated incremental borrowing rate as the discount rate for leases.
- The lease term includes the noncancellable period of the lease. Lease payments included in the measurement of the lease liability are composed of fixed payments and purchase option prices that the Town is reasonably certain to exercise.

The Town monitors changes in circumstances that would require a remeasurement of its lease and will remeasure the lease asset and liability if certain changes occur that are expected to significantly affect the amount of the lease liability.

Lease assets are reported with capital assets on the Statement of Net Position and lease liabilities are reported with non-current liabilities on the Statement of Net Position.

#### J. Subscription-Based Information Technology Arrangements ("SBITA")

The Town has noncancellable SBITAs of various IT software. The Town recognizes an SBITA liability and an intangible right-to-use SBITA asset on the Statement of Net Position. The Town recognizes SBITAs with an initial, individual value of \$5,000 or more.

At the commencement of an SBITA, the Town initially measures the SBITA liability at the present value of payments expected to be made during the SBITA term. Subsequently, the SBITA liability is reduced by the principal portion of SBITA payments made. The SBITA asset is initially measured as the initial amount of the SBITA liability, adjusted for SBITA payments made at or before the SBITA commencement date, plus certain implementation and conversion costs. Subsequently, the SBITA asset is amortized on a straight-line basis over its useful life.

Key estimates and judgments related to SBITAs include how the Town determines: 1) the discount rate it uses to discount the expected SBITA payments to present value, 2) the SBITA term, and 3) SBITA payments:

- The Town uses the interest rate charged by the SBITA vendor as the discount rate. When the interest rate charged by the SBITA vendor is not provided, the Town uses the 10-year treasury rate at the SBITA inception date as the discount rate.

## NOTES TO FINANCIAL STATEMENTS

### NOTE 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

#### J. Subscription-Based Information Technology Arrangements ("SBITA") (Continued)

- The Town term includes the noncancellable period of the SBITA. SBITA payments included in the measurement of the SBITA liability are composed of fixed payments and purchase option prices that the SBITA is reasonably certain to exercise.

The Town monitors changes in circumstances that would require a remeasurement of its SBITA and will remeasure the SBITA asset and liability if certain changes occur that are expected to significantly affect the amount of the SBITA liability.

The Town reports SBITA assets with capital assets and SBITA liabilities are reported with non-current liabilities on the Statement of Net Position.

#### K. Deferred Outflows/Inflows of Resources

##### *Deferred Outflows of Resources*

In addition to assets, the Statement of Net Position will sometimes report a separate section for deferred outflows of resources. This separate financial statement element, *deferred outflows of resources*, represents a consumption of net assets that applies to a future period(s) and so will not be recognized as an outflow of resources (expense/expenditure) until then. The Town has deferred outflows related to the pension plan that qualify for reporting in this category, and are further disclosed in Note 13.

##### *Deferred Inflows of Resources*

In addition to liabilities, the Statement of Net Position will sometimes report a separate section for deferred inflows of resources. This separate financial statement element, *deferred inflows of resources*, represents an acquisition of net assets that applies to a future period(s) and so will not be recognized as an inflow of resources (revenue) until that time. The Town has deferred inflows related to the pension plan that qualify for reporting in this category, and are further disclosed in Note 13. The other item, deferred refunding charges, resulted from the refunding of bonds and is amortized over the shorter of the life of the new debt or refunded debt.

##### *Unearned Revenue*

The Town also defers revenue recognition in connection with resources that have been billed or received, but not yet earned, such as memberships and gift certificates, when applicable.

## NOTES TO FINANCIAL STATEMENTS

### NOTE 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

#### L. Pensions

For purposes of measuring the net pension liability, deferred outflows of resources and deferred inflows of resources related to pensions, and pension expense, information about the fiduciary net position of the South Carolina Retirement System (“SCRS”) and the Police Officers’ Retirement System (“PORS”) and additions to/deductions from the SCRS’s and PORS’s fiduciary net position have been determined on the accrual basis of accounting as they are reported by SCRS and PORS, respectively, in accordance with GAAP. For this purpose, benefit payments (including refunds of employee contributions) are recognized when due and payable in accordance with the benefit terms. Investments are reported at fair value.

#### M. Long-Term Obligations

In the government-wide financial statements, long-term debt and other long-term obligations are reported as liabilities in the applicable governmental activities Statement of Net Position. In the fund financial statements, governmental fund types recognize bond premiums and discounts, as well as bond issuance costs, during the current period. The face amount of debt issued is reported as other financing sources.

Premiums received on debt issuances are reported as other financing sources while discounts on debt issuances are reported as other financing uses. Issuance costs, whether or not withheld from the actual debt proceeds received, are reported as debt service expenditures.

#### N. Fund Equity

Fund equity at the governmental fund financial reporting level is classified as “fund balance.” Fund equity for all other reporting is classified as “net position.”

**Fund Balances** – Generally, fund balances represent the difference between the assets and liabilities under the current financial resources measurement focus of accounting. In the fund financial statements, governmental funds report fund balance classifications that comprise a hierarchy based primarily on the extent to which the Town is bound to honor constraints on the specific purposes for which amounts in those funds can be spent. Fund balances are classified as follows:

- **Non-spendable** – Fund balances are reported as non-spendable when amounts cannot be spent because they are either: a) not in spendable form (i.e., items that are not expected to be converted to cash), or b) legally or contractually required to be maintained intact.
- **Restricted** – Fund balances are reported as restricted when there are limitations imposed on their use either through the enabling legislation adopted by the Town or through external restrictions imposed by creditors, grantors or laws or regulations of other governments.

## NOTES TO FINANCIAL STATEMENTS

### NOTE 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

#### N. Fund Equity (Continued)

- **Committed** – Fund balances are reported as committed when they can be used only for specific purposes pursuant to a Council imposed ordinance and can only be modified or removed by the same formal Council action. These can include amounts set aside based on self-imposed limitations established and set in place prior to fiscal year-end but can be calculated after fiscal year-end.
- **Assigned** – Fund balances are reported as assigned when amounts are constrained by the Town's intent to be used for specific purposes, but are neither restricted nor committed. Through resolution, the Town has authorized the Town Manager and Finance Director to assign fund balances.
- **Unassigned** – Fund balances are reported as unassigned as the residual amount when the balances do not meet any of the above criterion. The Town reports positive unassigned fund balance only in the General Fund. Negative unassigned fund balances may be reported in all funds.

**Flow Assumptions** – When both restricted and unrestricted amounts of fund balance are available for use for expenditures incurred, it is the Town's policy to use restricted amounts first and then unrestricted amounts as they are needed. For unrestricted amounts of fund balance, it is the Town's policy to use fund balance in the following order: 1) committed, 2) assigned, and 3) unassigned.

**Net Position** – Net position represents the difference between assets plus deferred outflows of resources and liabilities plus deferred inflows of resources in reporting which utilizes the economic resources measurement focus. Net investment in capital assets consists of capital assets, net of accumulated depreciation, reduced by the outstanding balances of any borrowing used (i.e., the amount that the Town has spent) for the acquisition, construction or improvement of those assets. Net position is reported as restricted using the same definition as used for restricted fund balance as described in the section above. All other net position is reported as unrestricted.

The Town applies restricted resources first when an expense is incurred for purposes for which both restricted and unrestricted net position are available.



## NOTES TO FINANCIAL STATEMENTS

### NOTE 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

#### O. Accounting Estimates

The preparation of financial statements in conformity with GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

#### P. Compensated Absences

Full-time employees accrue paid time-off ("PTO") in varying percentages to specified maximums depending on tenure with the Town. For the Town's government-wide funds, an expense and a liability for compensated absences and the salary-related payments are recorded within those funds as the PTO is earned. The General Fund is used to liquidate the liability for compensated absences and the amount of the liability generally reported as a current liability is based on amounts paid out during the current fiscal year.

#### Q. Allowance for Uncollectible Accounts

All receivables are expected to be collected, so an allowance for uncollectible accounts was not considered necessary.

#### R. Property Taxes

Beaufort County assesses and collects property taxes and distributes an allocable portion to the Town of Bluffton. Real estate taxes for the current calendar year are levied during October and become delinquent the following January 15<sup>th</sup>. Taxes on licensed motor vehicles are levied during the month when the license registration is up for renewal. The lien date is March 15<sup>th</sup>.

NOTES TO FINANCIAL STATEMENTS

NOTE 2. CASH AND CASH EQUIVALENTS

Total deposits and investments as of June 30, 2024 are summarized as follows:

Statement of Net Position:	
Cash	\$ 40,370,024
Restricted cash	25,478,739
Total cash	<u>\$ 65,848,763</u>
Cash deposited with financial institutions	\$ 65,848,763
	<u>\$ 65,848,763</u>

The Town had restricted cash in the amount of \$25,478,739 as of June 30, 2024. These amounts are legally restricted according to developer agreements and Town ordinances for capital projects.

All of the Town’s deposits are properly collateralized as of June 30, 2024.

NOTE 3. INVESTMENTS

The Town’s primary objectives, in priority order, of investment activities shall be safety, liquidity and yield. In accordance with South Carolina Statute SC Code Ann. Section 6-5-10, authorized investments by political subdivisions include:

- 1) Obligations of the United States and its agencies, the principal and interest of which is fully guaranteed by the United States.
- 2) Obligations issued by the Federal Financing Bank, Federal Farm Credit Bank, the Bank of Cooperatives, the Federal Intermediate Credit Bank, the Federal Land Banks, the Federal Home Loan Banks, the Federal Home Loan Mortgage Corporation, the Federal National Mortgage Association, the Government National Mortgage Association, the Federal Housing Administration, and the Farmers Home Administration, if, at the time of investment, the obligor has a long-term, unenhanced, unsecured debt rating in one of the top two ratings categories, without regard to a refinement or gradation of rating category by numerical modifier or otherwise, issued by at least two nationally recognized credit rating organizations.
- 3) General obligations of the State of South Carolina or any of its political units or revenue obligations of the State of South Carolina or its political units, if at the time of investment, the obligor has a long-term, unenhanced, unsecured debt rating in one of the top two ratings categories, without regard to a refinement or gradation of rating category by numerical modifier or otherwise, issued by at least two nationally recognized credit rating organizations.
- 4) Savings and Loan Associations to the extent that the same are insured by an agency of the federal government.

NOTES TO FINANCIAL STATEMENTS

NOTE 3. INVESTMENTS (CONTINUED)

- 5) Certificates of deposit where the certificates are collaterally secured by securities of the type described in items 1) and 2) above held by a third-party as escrow agent or custodian, of a market value not less than the amount of the certificates of deposit so secured, including interest provided, however, such collateral shall not be required to the extent the same are insured by an agency of the federal government.
- 6) Repurchase agreements when collateralized by securities as set forth in this section.
- 7) No load open-end or closed-end management type investment companies or investment trusts registered under the Investment Company Act of 1940, as amended, where the investment is made by a bank or trust company or savings and loan association or other financial institution when acting as trustee or agent for a bond or other debt issue of that local government unit, political subdivision, or Town treasurer if the particular portfolio of the investment company or investment trust in which the investment is made: i) is limited to obligations described in items 1), 2), 3), and 6) of this subsection, and ii) has among its objectives the attempt to maintain a constant net asset value of \$1 a share and to that end, value its assets by the amortized cost method. The provisions of this chapter shall not impair the power of a municipality or Town treasurer to hold funds in deposit accounts with banking institutions as otherwise authorized by law.

At June 30, 2024, the Town reported \$17,598,193 in investments all of which are in U.S. Treasury Notes. Maturity for the Town’s investments range from less than one year up to five years and are categorized as level 1 in the fair value hierarchy. Level 1 inputs are quoted prices in active markets for identical assets. As these investments are backed by the U.S. Treasury, collateral is not required.

NOTE 4. RECEIVABLES

Receivables as of June 30, 2024 are as follows:

	General Fund	Capital Improvement Programs Fund	Debt Service Fund	Stormwater Fund	Local Accommodations Tax Fund	Hospitality Tax Fund	Nonmajor Governmental Funds	Total
Receivables:								
Due from other governments	\$ 375,309	\$ 1,280,016	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,655,325
DRCI	109,114	-	-	-	-	-	-	109,114
Franchise fees	314,807	-	-	-	-	-	-	314,807
Hospitality taxes	-	-	-	-	-	436,366	-	436,366
Insurance	1,139,245	-	-	-	-	-	-	1,139,245
Licenses and permits	418,553	-	-	-	-	-	-	418,553
Local accommodations taxes	-	-	-	-	319,264	-	-	319,264
Other/miscellaneous	31,147	-	-	-	-	-	-	31,147
Property taxes	84,859	-	400	-	-	-	-	85,259
School resources	190,622	-	-	-	-	-	-	190,622
State accommodations taxes	-	-	-	-	-	-	457,086	457,086
Vehicle tag fees	-	-	-	-	-	-	1,202	1,202
Stormwater utility fees	-	-	-	40,338	-	-	-	40,338
Total receivables	\$ 2,663,656	\$ 1,280,016	\$ 400	\$ 40,338	\$ 319,264	\$ 436,366	\$ 458,288	\$ 5,198,328

## NOTES TO FINANCIAL STATEMENTS

### NOTE 5. INTERFUND RECEIVABLES, PAYABLES AND TRANSFERS

The composition of interfund balances as of June 30, 2024 is as follows:

Due To	Due From								Total
	General	Capital	Debt Service	Stormwater	Hospitality	Local	TIF Project	Nonmajor	
	Fund	Improvement Programs Fund	Fund	Fund	Tax Fund	Accommodations Tax Fund	Fund	Governmental Funds	
General Fund	\$ -	\$ 1,351,310	\$ 2,548,334	\$ 2,812,405	\$ 3,923,740	\$ 857,075	\$ 5,805,456	\$ 257,668	\$ 17,555,988
Capital Improvement Projects Fund	13,092,791	-	-	-	255,042	-	12,523	42,000	13,402,356
Debt Service Fund	230,118	2,543,787	-	806,750	-	-	-	-	3,580,655
Stormwater Fund	951,687	80,208	-	-	-	-	-	-	1,031,895
Local Accommodations Tax Fund	-	273,148	-	-	1,457,696	-	-	34,774	1,765,618
Hospitality Tax Fund	296,685	-	-	-	-	833,149	-	-	1,129,834
TIF Project Fund	190	-	635,426	-	-	-	-	-	635,616
Nonmajor Governmental Funds	75,737	-	-	-	-	-	-	-	75,737
	<u>\$ 14,647,208</u>	<u>\$ 4,248,453</u>	<u>\$ 3,183,760</u>	<u>\$ 3,619,155</u>	<u>\$ 5,636,478</u>	<u>\$ 1,690,224</u>	<u>\$ 5,817,979</u>	<u>\$ 334,442</u>	<u>\$ 39,177,699</u>

Interfund balances largely result from the time lag between the dates that: 1) interfund goods and services are provided or reimbursable expenditures occur, 2) transactions are recorded in the accounting system, and 3) payments between funds are made. All interfund balances noted above are the result of the time lag between the dates that interfund goods and services are provided or the reimbursable expenditures occur.

The composition of interfund transfers for the year ended June 30, 2024 is as follows:

Transfers In	Transfers Out							Total
	General	TIF Project	Debt Service	Stormwater	Hospitality	Local	Nonmajor	
	Fund	Fund		Fund	Tax Fund	Accommodations Tax Fund	Governmental Funds	
General Fund	\$ -	\$ -	\$ -	\$ 335,866	\$ 2,123,436	\$ 176,335	\$ 78,715	\$ 2,714,352
Capital Improvement Projects Fund	2,638,407	5,732,524	781,387	235,058	2,100,738	1,259,796	-	12,747,910
Debt Service Fund	-	-	-	293,800	-	-	-	293,800
	<u>\$ 2,638,407</u>	<u>\$ 5,732,524</u>	<u>\$ 781,387</u>	<u>\$ 864,724</u>	<u>\$ 4,224,174</u>	<u>\$ 1,436,131</u>	<u>\$ 78,715</u>	<u>\$ 15,756,062</u>

Transfers are used: 1) to move revenues from the fund that a statute or budget requires to collect them to the fund that a statute or budget requires to expend them, and 2) to use unrestricted revenues collected in the General Fund to finance various programs accounted for in other funds in accordance with budgetary authorizations. Transfers to the Capital Improvement Programs Fund are to fund capital projects from various revenue sources. Transfers to the Debt Service Fund are outlined in item 1) above.

## NOTES TO FINANCIAL STATEMENTS

### NOTE 6. CAPITAL ASSETS

Capital asset activity for the governmental activities for the year ended June 30, 2024 is as follows:

	Beginning Balance	Increases	Decreases	Transfers	Ending Balance
<b>Governmental activities</b>					
Capital assets, not being depreciated:					
Land	\$ 18,066,150	\$ -	\$ -	\$ 2,507,015	\$ 20,573,165
Construction in progress	4,565,299	13,278,119	-	(7,670,707)	10,172,711
Total	<u>22,631,449</u>	<u>13,278,119</u>	<u>-</u>	<u>(5,163,692)</u>	<u>30,745,876</u>
Capital assets, being depreciated:					
Buildings and improvements	12,787,497	-	-	169,115	12,956,612
Drainage	926,977	-	-	1,483,975	2,410,952
Roads	5,196,627	-	-	-	5,196,627
Right-to-use lease vehicles	845,020	1,472,832	(116,353)	-	2,201,499
Right-to-use SBITAs	104,979	-	-	-	104,979
Sidewalks and trails	3,681,455	-	-	382,894	4,064,349
Land improvements	4,249,584	-	-	2,870,731	7,120,315
Machinery and equipment	3,238,510	232,686	-	256,977	3,728,173
Vehicles	2,656,419	405,067	(386,700)	-	2,674,786
Total	<u>33,687,068</u>	<u>2,110,585</u>	<u>(503,053)</u>	<u>5,163,692</u>	<u>40,458,292</u>
Less accumulated depreciation for:					
Buildings and improvements	(3,803,579)	(368,554)	-	-	(4,172,133)
Drainage	(520,489)	(47,332)	-	-	(567,821)
Roads	(3,114,953)	(262,441)	-	-	(3,377,394)
Right-to-use lease vehicles	(232,481)	(197,007)	42,606	-	(386,882)
Right-to-use SBITAs	(34,993)	(34,994)	-	-	(69,987)
Sidewalks and trails	(1,063,502)	(170,655)	-	-	(1,234,157)
Land improvements	(710,746)	(193,666)	-	-	(904,412)
Machinery and equipment	(2,505,247)	(183,119)	-	-	(2,688,366)
Vehicles	(2,183,854)	(227,685)	386,700	-	(2,024,839)
Total	<u>(14,169,844)</u>	<u>(1,685,453)</u>	<u>429,306</u>	<u>-</u>	<u>(15,425,991)</u>
Total capital assets, being depreciated, net	<u>19,517,224</u>	<u>425,132</u>	<u>(73,747)</u>	<u>5,163,692</u>	<u>25,032,301</u>
Governmental activities capital assets, net	<u>\$ 42,148,673</u>	<u>\$ 13,703,251</u>	<u>\$ (73,747)</u>	<u>\$ -</u>	<u>\$ 55,778,177</u>

NOTES TO FINANCIAL STATEMENTS

NOTE 6. CAPITAL ASSETS (CONTINUED)

Depreciation expense was charged to functions/programs of the primary government as follows:

Governmental Activities	
Administrative	\$ 50,200
Public works	97,586
Stormwater	36,826
Engineering	721,326
Information technology	52,327
Planning	1,636
Police department	589,790
Community development	135,762
Total depreciation/amortization expense - governmental activities	\$ 1,685,453

NOTE 7. NET INVESTMENT IN CAPITAL ASSETS

A significant portion of the net position reported in the government-wide Statement of Net Position is attributable to the Town’s investment in capital assets. The amount is calculated as follows:

Capital assets	\$ 71,204,168
Less: accumulated depreciation	(15,425,991)
	55,778,177
Less: General obligation bonds	(8,023,180)
Less: Revenue bonds	(10,873,418)
Less: Leases	(1,806,621)
Less: Subscription-based IT arrangements	(38,451)
Less: Retainage and construction accounts payable	(877,757)
Plus: Unspent bond proceeds	5,669,069
Less: Deferred refunding charges	(105,581)
	(16,055,939)
Net investment in capital assets	\$ 39,722,238

## NOTES TO FINANCIAL STATEMENTS

### NOTE 8. LONG-TERM DEBT

The following is a summary of changes in the Town's long-term obligations as of June 30, 2024:

	Beginning Balance	Additions	Reductions	Ending Balance	Due Within One Year
Governmental activities					
GO bonds	\$ 7,525,000	\$ -	\$ (400,000)	\$ 7,125,000	\$ 420,000
GO bond premium	1,039,676	-	(141,496)	898,180	-
Total GO bonds	8,564,676	-	(541,496)	8,023,180	420,000
Revenue bonds	12,063,571	-	(1,190,153)	10,873,418	1,223,939
Financed purchases	319,093	-	(319,093)	-	-
Leases	626,269	1,472,832	(292,480)	1,806,621	425,376
SBITAs	75,691	-	(37,240)	38,451	38,451
Compensated absences	1,245,270	752,854	(674,978)	1,323,146	674,978
Net pension liability	17,955,688	4,863,300	(4,268,190)	18,550,798	-
Total long-term liabilities	<u>\$ 40,850,258</u>	<u>\$ 7,088,986</u>	<u>\$ (7,323,630)</u>	<u>\$ 40,615,614</u>	<u>\$ 2,782,744</u>

Generally, the General Fund is used to liquidate the net pension liability, leases, and compensated absences.

#### A. General Obligation ("GO") Bonds

In fiscal year 2021, the Town issued General Obligation ("GO") Bonds, Series 2020A in the amount of \$5,250,000 for the purpose of funding the Stormwater Utility Fund Capital Improvement Programs projects, which include projects to improve the water quality and economic viability of the May River and surrounding rivers and watersheds. This bond issue did not require a new tax levy or increase in the current millage rate. The bonds carry a 5% interest rate and principal and interest are payable through 2040.

Additionally, in fiscal year 2021, the Town issued GO Bonds, Series 2020 in the amount of \$4,405,000 for the purpose of refunding the Series 2010 Bonds and paying the cost of issuance of the Series 2020 bonds. The refunding resulted in a \$59,000 net annual savings and reduced the debt millage rate to 1.7 mills. The 2020 bonds carry a 5% interest rate and principal and interest are payable through 2035.



## NOTES TO FINANCIAL STATEMENTS

### NOTE 8. LONG-TERM DEBT (CONTINUED)

#### A. General Obligation (“GO”) Bonds (Continued)

A schedule of the amounts due are as follows:

Fiscal Year ending June 30,	Principal	Interest	Total
2025	\$ 420,000	\$ 253,100	\$ 673,100
2026	440,000	232,100	672,100
2027	460,000	210,100	670,100
2028	485,000	187,100	672,100
2029	510,000	162,850	672,850
2030 – 2034	2,850,000	498,250	3,348,250
2035 – 2039	1,675,000	170,500	1,845,500
2040	285,000	8,550	293,550
Total	<u>\$ 7,125,000</u>	<u>\$ 1,722,550</u>	<u>\$ 8,847,550</u>

#### B. Revenue Bonds

On December 1, 2014, the Town issued \$8,923,000 of TIF bonds bearing interest at 2.58% for a current refunding of the \$9,920,000 of outstanding principal of tax increment financing bonds issued by the Town in 2010. The principal and interest on these bonds are paid via the pledged revenue of up to 50% of the incremental increase in property taxes due to the economic development in the Town’s TIF district and a pledge of the Municipal Improvement District (“MID”) fees. The full faith, credit and taxing powers of the Town are not pledged for the payment of the TIF bonds nor the interest on these bonds. The principal and interest on the bonds is payable from tax revenues received by the Town with respect to the Redevelopment Project Area. The refunding was undertaken to reduce total future debt service payments. The transaction resulted in an economic gain of \$254,853 and a reduction of \$736,548 in future debt service payments.

On October 13, 2022, the Town issued \$9,800,000 of TIF bonds bearing interest at 3.46% for Capital Improvement Programs projects, which include project improvements to Barn Park, Sarah Riley Hooks Cottage, and Squire Pope Carriage House.

## NOTES TO FINANCIAL STATEMENTS

### NOTE 8. LONG-TERM DEBT (CONTINUED)

#### B. Revenue Bonds (Continued)

A schedule of the amounts due are as follows:

<u>Fiscal Year ending June 30,</u>	<u>Principal</u>	<u>Interest</u>	<u>Total</u>
2025	\$ 1,223,939	\$ 348,675	\$ 1,572,614
2026	1,258,702	313,912	1,572,614
2027	1,282,293	290,321	1,572,614
2028	1,326,660	245,954	1,572,614
2029	1,372,563	200,051	1,572,614
2030 – 2032	4,409,261	308,580	4,717,841
Total	<u>\$ 10,873,418</u>	<u>\$ 1,707,493</u>	<u>\$ 12,580,911</u>

#### C. Leases

During the fiscal year ended June 30, 2023, the Town entered into a lease agreement with Enterprise Fleet Management for the lease of a number of vehicles for the police department. The purchase price of each vehicle ranges from \$33,002 to \$186,518. The leases bear interest at a rate of 3.2% - 3.6% and are payable in annual installments of principal and interest over their lease terms that extend through 2029. The leases are being paid annually through the General Fund. A schedule of the amount due for these leases is as follows:

<u>Fiscal Year ending June 30,</u>	<u>Principal</u>	<u>Interest</u>	<u>Total</u>
2025	\$ 425,376	\$ 52,932	\$ 478,308
2026	439,672	38,636	478,308
2027	379,669	24,574	404,243
2028	324,801	13,372	338,173
2029	237,103	3,509	240,612
Total	<u>\$ 1,806,621</u>	<u>\$ 133,023</u>	<u>\$ 1,939,644</u>

NOTES TO FINANCIAL STATEMENTS

NOTE 8. LONG-TERM DEBT (CONTINUED)

D. SBITAs

During the fiscal year ended June 30, 2023, the Town entered into SBITAs for periods between one and five years as for the use of certain information technology items. Interest is calculated at a rate of 3.75% on all SBITAs. The SBITAs are being paid annually through the General Fund. A schedule of the amount due for these SBITAs is as follows:

<u>Fiscal Year ending June 30,</u>	<u>Principal</u>	<u>Interest</u>	<u>Total</u>
2025	\$ 38,451	\$ 1,250	\$ 39,701
Total	<u>\$ 38,451</u>	<u>\$ 1,250</u>	<u>\$ 39,701</u>

NOTE 9. COMPUTATION OF LEGAL DEBT LIMITATION

The Town’s general obligation debt is limited by law to 8% of the total assessed value of all taxable real and personal property within the Town limits. The largest projected assessed value as of June 30, 2024 was \$427,225,202. The computation of legal debt limits is as follows:

General obligation debt limit (\$427,225,202 x 8%)	\$ 34,178,016
General obligation debt at June 30, 2024	<u>(7,125,000)</u>
Excess of debt limit over general obligation debt	<u>\$ 27,053,016</u>

NOTE 10. STATE ACCOMMODATIONS TAX FUND

State Accommodations Tax Fund is a Special Revenue Fund to record State Accommodations Tax receipts and grants approved by Town Council payable out of appropriations. In accordance with State law, the first \$25,000 and 5% thereafter is transferred to the General Fund and 30% is distributed to the Hilton Head Island-Bluffton Chamber of Commerce’s Visitor and Convention Bureau. Transfers to the General Fund for the year ended June 30, 2024 totaled \$535,741, and the distributions to the Visitor and Convention Bureau totaled \$322,290. The remaining amounts (65%) are restricted to tourism-related projects approved by Town Council.

## NOTES TO FINANCIAL STATEMENTS

### NOTE 10. STATE ACCOMMODATIONS TAX FUND (CONTINUED)

Grant appropriations and expenditures for the year ended June 30, 2024 were as follows:

Grant Recipient	Appropriations	Expenditures	Lapsed	Encumbrances
State Accommodations Tax:				
BlacQuity	\$ 46,836	\$ 14,007	\$ 7,829	\$ 25,000
Bluffton Gullah Heritage Center	235,000	220,667	14,333	-
Bluffton MLK Observance Committee	31,321	16,908	11,322	3,091
Boys and Girls Club of the Lowcountry	21,650	19,855	1,795	-
Campbell Chapel Community Development	127,000	-	-	127,000
Coastal Conservation Association	10,000	8,972	1,028	-
Congregation Beth Yam	6,000	1,995	4,005	-
Farmers Market of Bluffton	88,849	33,119	16,140	39,590
Gullah Traveling Theater, Inc.	9,750	-	-	9,750
Hilton Head Island-Bluffton Chamber of Commerce	45,000	45,000	-	-
Hilton Head Symphony Orchestra	97,135	40,497	13,006	43,632
Historic Bluffton Arts and Seafood Festival	106,472	106,472	-	-
Historic Bluffton Foundation	275,568	218,866	16,702	40,000
May River Theatre, Inc.	74,621	34,606	22,902	17,113
The New Bluffton Worship	15,280	9,070	6,210	-
Old Town Merchants Society	42,592	8,930	5,162	28,500
The Rotary Club of Bluffton	40,000	6,734	8,266	25,000
SC Lowcountry Tourism	25,755	-	25,755	-
Society of Bluffton Artists	36,217	17,286	4,402	14,529
Town of Bluffton	457,026	457,026	-	-
Total State Accommodations Tax	<u>\$ 1,792,072</u>	<u>\$ 1,260,010</u>	<u>\$ 158,857</u>	<u>\$ 373,205</u>

The unpaid balances for approved grants are reflected as an encumbrance of fund balance in the State Accommodations Tax Fund. Fund balance at June 30, 2024 was \$1,002,332.

### NOTE 11. LOCAL ACCOMMODATIONS TAX FUND

Local Accommodations Tax Fund is a Special Revenue Fund to record Local Accommodations Tax receipts and grants approved by Town Council payable out of appropriations. For the fiscal year ended June 30, 2024, the Town did not have any appropriations. The remaining amounts are allocated to tourism-related projects approved by Town Council.

The fund balance of the Special Revenue Fund is restricted for tourism-related projects under South Carolina Code except for the allowable 1% committed to Emergency Recovery by Town Council. Fund balance at June 30, 2024 was \$3,194,103.

## NOTES TO FINANCIAL STATEMENTS

### NOTE 12. FUND BALANCES

As prescribed by GASB Statement No. 54, governmental funds report fund balance in classifications based primarily on the extent to which the Town is bound to constraints on the specific purposes for which amounts in the funds can be spent. As of June 30, 2024, fund balances were distributed as follows:

	General Fund	Capital Improvement Programs Fund	Debt Service Fund	Stormwater Fund	Local Accommodations Tax Fund	Hospitality Tax Fund	Project Fund	Nonmajor Governmental Funds	Total Governmental Funds
<b>Fund Balances:</b>									
<b>Non-spendable:</b> Prepaid Assets	\$ 638,937	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 638,937
<b>Restricted for:</b>									
Drug Enforcement (SC Code of Laws 44-53-530 (g))	-	-	-	-	-	-	-	14,539	14,539
Public Safety (Budget Ordinance)	-	-	-	-	-	-	-	33,853	33,853
Stormwater Improvement (SW Fee Ordinance)	-	-	-	4,018,962	-	-	-	-	4,018,962
TIF Debt Service (Bond & Budget Ordinance)	-	-	11,120,244	-	-	-	4,519,519	-	15,639,763
GO Bond Debt Service (Bond & Budget Ordinance)	-	-	678,014	-	-	-	3,810,999	-	4,489,013
<b>Municipal Improvement:</b>									
District Funds (Development Agreement)	-	2,984,623	-	-	-	-	-	-	2,984,623
Boat Ramp Repair (Development Agreement)	-	-	-	-	-	-	-	124,630	124,630
Buckwalter Park (Development Agreement)	-	354,185	-	-	-	-	-	-	354,185
Linear Park (Development Agreement)	-	140,863	-	-	-	-	-	-	140,863
Kent Estates Leisure Trail (Development Agreement)	28,000	42,000	-	-	-	-	-	-	70,000
Village of Verdier Leisure Trail (Development Agreement)	42,000	28,000	-	-	-	-	-	-	70,000
Tree Fund (unified code)	6,263	-	-	-	-	-	-	-	6,263
Tourism Projects and Related Support (SC Code 6-1-530 & 730)	-	1,542,196	-	-	3,068,624	7,508,702	-	1,002,332	13,121,854
<b>Committed to:</b>									
Emergency Recovery Fund (Budget Ordinance)	10,293,131	-	-	-	125,479	-	-	-	10,418,610
Capital Asset Reserve (Budget Ordinance)	3,096,397	-	-	-	-	-	-	-	3,096,397
<b>Assigned to:</b>									
Preservation Grant	250,000	-	-	-	-	-	-	-	250,000
Proactive Preservation	300,000	-	-	-	-	-	-	-	300,000
Public Art	100,000	-	-	-	-	-	-	-	100,000
Neighborhood Assistance Program	400,000	-	-	-	-	-	-	-	400,000
Tree Remediation	100,000	-	-	-	-	-	-	-	100,000
Other Capital Improvement Purposes	-	4,022,083	-	-	-	-	-	-	4,022,083
<b>Unassigned:</b>	18,768,317	-	-	-	-	-	-	-	18,768,317
<b>Total Fund Balances</b>	<u>\$ 34,023,045</u>	<u>\$ 9,113,950</u>	<u>\$ 11,798,258</u>	<u>\$ 4,018,962</u>	<u>\$ 3,194,103</u>	<u>\$ 7,508,702</u>	<u>\$ 8,330,518</u>	<u>\$ 1,175,354</u>	<u>\$ 79,162,892</u>

Ordinance No. 2023-03 *Fiscal Year 2024 Budget* establishes the following designated reserve funds:

**Emergency Recovery Fund** – This fund shall be funded at an amount equal to or greater than 15% of the current fiscal year governmental funds expenditure budget amount. For the fiscal year 2024, this amount was established as \$10,293,131. The fund amount is established by Council Ordinance every year with the adoption of each year's General Fund budget. The fund was created to provide emergency funds for a natural disaster (i.e., hurricane) or other state of emergency.

**Capital Asset Reserve Fund** – This reserve shall be capped at the value of the most recent five years of depreciation expense. This reserve shall be funded at an amount equal to 50% of depreciation expense from the most recently audited financial statements. This funding will occur in years in which there is a positive net change in the prior year's General Fund fund balance. In addition, any insurance proceeds from totaled vehicles and proceeds from the sale of vehicles and equipment will be designated as reserved for future vehicle or equipment purchases. Debt Service requirements (lease principal and interest payments) are charged to Departmental Cost Centers and reduce the Capital Asset Reserve each year. For the fiscal year 2024, this amount was established at \$3,096,397.

## NOTES TO FINANCIAL STATEMENTS

---

### NOTE 12. FUND BALANCES (CONTINUED)

Fiscal year 2024 also includes assigned fund balances for a Preservation Grant, Proactive Preservation, Public Art, a Neighborhood Assistance Program, and Tree Remediation.

### NOTE 13. DEFINED BENEFIT PENSION PLAN

#### *Description of the Entity*

The South Carolina Public Employee Benefit Authority ("PEBA"), created July 1, 2012, is the State agency responsible for the administration and management of the various retirement systems (the "Systems") and retirement programs of the state of South Carolina, including the State Optional Retirement Program and the South Carolina Deferred Compensation Program, as well as the state's employee insurance programs. As such, PEBA is responsible for administering the South Carolina Retirement Systems' five defined benefit pension plans. PEBA has an 11-member Board of Directors, appointed by the Governor and General Assembly leadership, which serves as custodian, co-trustee and co-fiduciary of the Systems and the assets of the retirement trust funds. The Retirement System Investment Commission ("Commission" as the governing body, "RSIC" as the agency), created by the General Assembly in 2005, has exclusive authority to invest and manage the retirement trust funds' assets. The Commission, an eight-member board, serves as co-trustee and co-fiduciary for the assets of the retirement trust funds. By law, the State Fiscal Accountability Authority ("SFAA"), which consists of five elected officials, also reviews certain PEBA Board decisions regarding the actuary of the Systems.

For purposes of measuring the net pension liability, deferred outflows and inflows of resources related to pensions, and pension expense, information about the fiduciary net position of the Systems and additions to/deductions from the Systems fiduciary net position have been determined on the accrual basis of accounting as they are reported by the Systems in accordance with GAAP. For this purpose, revenues are recognized when earned and expenses are recognized when incurred. Benefit and refund expenses are recognized when due and payable in accordance with the terms of the plan. Investments are reported at fair value.

#### *Plan Description*

The Town contributes to the South Carolina Retirement System ("SCRS"), a cost-sharing multiple-employer defined benefit pension plan, was established July 1, 1945, pursuant to the provisions of Section 9-1-20 of the South Carolina Code of Laws for the purpose of providing retirement and other benefits for teachers and employees of the state and its political subdivisions. SCRS covers employees of state agencies, public school districts and participating charter schools, public higher education institutions, other participating local subdivisions of government and first-term individuals elected to the South Carolina General Assembly at or after the general election in November 2012.

## NOTES TO FINANCIAL STATEMENTS

### NOTE 13. DEFINED BENEFIT PENSION PLAN (CONTINUED)

#### *Plan Description (Continued)*

In addition to the SCRS pension plan, the Town also contributes to the South Carolina Police Officers' Retirement System ("PORS"), a cost-sharing multiple-employer defined benefit pension plan, was established July 1, 1962, pursuant to the provisions of Section 9-11-20 of the South Carolina Code of Laws for the purpose of providing retirement and other benefits to police officers and firefighters. PORS also covers peace officers, coroners, probate judges and magistrates.

#### *Membership*

Membership requirements are prescribed in Title 9 of the South Carolina Code of Laws. A brief summary of the requirements under each System is presented below.

**South Carolina Retirement System** – Generally, all employees of covered employers are required to participate in and contribute to the SCRS as a condition of employment. This plan covers general employees, teachers and individuals newly elected to the South Carolina General Assembly at or after the general election in November 2012. An employee member of the System with an effective date of membership prior to July 1, 2012 is a Class Two member. An employee member of the System with an effective date of membership on or after July 1, 2012 is a Class Three member.

**South Carolina Police Officers' Retirement System** – To be eligible for PORS membership, an employee must be required by the terms of his or her employment, by election or appointment, to preserve public order, protect life and property, and detect crimes in the state; to prevent and control property destruction by fire; be a coroner in a full-time permanent position; or to serve as a peace officer employed by the Department of Corrections, the Department of Juvenile Justice, or the Department of Mental Health. Probate judges and coroners may elect membership in PORS. Magistrates are required to participate in PORS for service as a magistrate. PORS members, other than magistrates and probate judges, must also earn at least \$2,000 per year and devote at least 1,600 hours per year to this work, unless exempted by statute. An employee member of the System with an effective date of membership prior to July 1, 2012 is a Class Two member. An employee member of the System with an effective date of membership on or after July 1, 2012 is a Class Three member.

#### *Benefits*

Benefit terms are prescribed in Title 9 of the South Carolina Code of Laws. PEBA does not have the authority to establish or amend benefit terms without a legislative change in the code of laws. Key elements of the benefit calculation include the benefit multiplier, years of service, and average final compensation. A brief summary of the benefit terms for each System is presented below.



## NOTES TO FINANCIAL STATEMENTS

---

### NOTE 13. DEFINED BENEFIT PENSION PLAN (CONTINUED)

#### *Benefits (Continued)*

**South Carolina Retirement System** – A Class Two member who has separated from service with at least five or more years of earned service is eligible for a monthly pension at age 65 or with 28 years credited service regardless of age. A member may elect early retirement with reduced pension benefits payable at age 55 with 25 years of service credit. A Class Three member who has separated from service with at least eight or more years of earned service is eligible for a monthly pension upon satisfying the Rule of 90 requirement that the total of the member's age and the member's creditable service equals at least 90 years. Both Class Two and Class Three members are eligible to receive a reduced deferred annuity at age 60 if they satisfy the five- or eight-year earned service requirement, respectively. An incidental death benefit is also available to beneficiaries of active or retired members of employees who participate in the death benefit program.

The annual retirement allowance of eligible retirees or their surviving annuitants is increased by the lesser of 1% or \$500 every July 1. Only those annuitants in receipt of a benefit on July 1 of the preceding year are eligible to receive the increase. Members who retire under the early retirement provisions at age 55 with 25 years of service are not eligible for the benefit adjustment until the second July 1 after reaching age 60 or the second July 1 after the date they would have had 28 years of service credit had they not retired.

**South Carolina Police Officers' Retirement** – A Class Two member who has separated from service with at least five or more years of earned service is eligible for a monthly pension at age 55 or with 25 years of service regardless of age. A Class Three member who has separated from service with at least eight or more years of earned service is eligible for a monthly pension at age 55 or with 27 years of service regardless of age. Both Class Two and Class Three members are eligible to receive a deferred annuity at age 55 with five or eight years of earned service, respectively. An incidental death benefit is also available to beneficiaries of active and retired members of employers who participate in the death benefit program. Accidental death benefits are also provided upon the death of an active member working for a covered employer whose death was a natural and proximate result of an injury incurred while in the performance of duty.

The retirement allowance of eligible retirees or their surviving annuitants is increased by the lesser of 1% or \$500 every July 1. Only those annuitants in receipt of a benefit on July 1 of the preceding year are eligible to receive the increase.

NOTES TO FINANCIAL STATEMENTS

NOTE 13. DEFINED BENEFIT PENSION PLAN (CONTINUED)

Contributions

Actuarial valuations are performed annually by an external consulting actuary to ensure applicable contribution rates satisfy the funding parameters specified in Title 9 of the South Carolina Code of Laws. Under these provisions, SCRS and PORS contribution requirements must be sufficient to maintain an amortization period for the financing of the unfunded actuarial accrued liability (“UAAL”) over a period that does not exceed the number of years scheduled in state statute. Effective July 1, 2017, employee rates were increased to a capped rate of 9.00% for SCRS and 9.75% for PORS. The legislation also increased employer contribution rates beginning July 1, 2017 for both SCRS and PORS until reaching 18.56% for SCRS and 21.24% for PORS. The legislation included further provision that if the scheduled contributions are not sufficient to meet the funding periods set in the statute, the PEBA board would increase the employer contribution rates as necessary to meet the funding periods set for the applicable year.

Pension reform legislation modified statute such that the employer contribution rates for SCRS and PORS to be further increased, not to exceed one-half of 1% in any one year if necessary, in order to improve the funding of the plans. The statute set rates intended to reduce the unfunded liability of SCRS and PORS to the maximum amortization period of 20 years from 30 years over a ten-year schedule, as determined by the annual actuarial valuations of the plan. Finally, under the revised statute, the contribution rates for SCRS and PORS may not be decreased until the plans are at least 85% funded.

Required employee contribution rates for the year ended June 30, 2024 are as follows:

<b>South Carolina Retirement System</b>		
	Employee Class Two	9.00% of earnable compensation
	Employee Class Three	9.00% of earnable compensation
<b>South Carolina Police Officers' Retirement System</b>		
	Employee Class Two	9.75% of earnable compensation
	Employee Class Three	9.75% of earnable compensation

NOTES TO FINANCIAL STATEMENTS

NOTE 13. DEFINED BENEFIT PENSION PLAN (CONTINUED)

Contributions (Continued)  
Required employer contribution rates for the year ended June 30, 2024 are as follows:

<b>South Carolina Retirement System</b>	
Employee Class Two	18.41% of earnable compensation
Employee Class Three	18.41% of earnable compensation
Employer incidental death benefit	0.15% of earnable compensation
<b>South Carolina Police Officers' Retirement System</b>	
Employee Class Two	20.84% of earnable compensation
Employee Class Three	20.84% of earnable compensation
Employer incidental death benefit	0.20% of earnable compensation
Employer accidental death program	0.20% of earnable compensation

Actuarial Assumptions and Methods

Actuarial valuations of the ongoing plan involve estimates of the reported amounts and assumptions about the probability of occurrence of events far into the future. Examples include assumptions about future employment, mortality and future salary increases. Amounts determined regarding the net pension liability are subject to continual revision as actual results are compared with past expectations and new estimates are made about the future. South Carolina state statute requires that an actuarial experience study be completed at least once in each five-year period. An experience report on the Systems was most recently issued for the reporting period ended June 30, 2019.

The following provides a summary of the actuarial assumptions and methods used in the July 1, 2023 valuations for SCRS and PORS.

	SCRS	PORS
Actuarial cost method	Entry Age	Entry Age
Actuarial assumptions:		
Investment rate of return	7.00%	7.00%
Projected salary increases	3.0% to 11.0% (varies by service)	3.5% to 10.5% (varies by service)
Includes inflation at	2.25%	2.25%
Benefit adjustments	Lesser of 1% or \$500	Lesser of 1% or \$500

## NOTES TO FINANCIAL STATEMENTS

### NOTE 13. DEFINED BENEFIT PENSION PLAN (CONTINUED)

*Actuarial Assumptions and Methods (Continued)*

Assumptions used in the July 1, 2023 valuations for SCRS and PORS are as follows:

Former Job Class	Males	Females
General Employees and Members of the General Assembly	2020 PRSC Males multiplied by 97%	2020 PRSC Females multiplied by 107%
Public Safety and Firefighters	2020 PRSC Males multiplied by 127%	2020 PRSC Females multiplied by 107%

The long-term expected rate of return on pension plan investments is based upon 20-year capital market assumptions. The long-term expected rates of return represent assumptions developed using an arithmetic building-block approach primarily based on consensus expectations and market based inputs. Expected returns are net of investment fees.

The expected returns, along with the expected inflation rate, form the basis for the target asset allocation adopted at the beginning of the 2023 fiscal year of the Systems. The long-term expected rate of return is calculated by weighting the expected future real rates of return by the target allocation percentage and then adding the actuarial expected inflation, which is summarized in the table below. For actuarial purposes, the 7.00% assumed annual investment rate of return used in the calculation of the total pension liability includes a 4.75% real rate of return and a 2.25% inflation component.

Asset Class	Target Asset Allocation	Expected Arithmetic Real Rate of Return	Long-Term Expected Portfolio Real Rate of Return
Public Equity	46.0%	6.62%	3.04%
Bonds	26.0%	0.31%	0.08%
Private Equity	9.0%	10.91%	0.98%
Private Debt	7.0%	6.16%	0.43%
Real Assets	12.0%		
Real estate	9.0%	6.41%	0.58%
Infrastructure	3.0%	6.62%	0.20%
	100.0%		
Total expected real return			5.31%
Inflation for actuarial purposes			2.25%
Total expected nominal return			7.56%

NOTES TO FINANCIAL STATEMENTS

NOTE 13. DEFINED BENEFIT PENSION PLAN (CONTINUED)

Net Pension Liability

The June 30, 2023 (the measurement date) total pension liability, net pension liability, and sensitivity information were determined by the Systems consulting actuary, Gabriel, Roeder, Smith and Company (“GRS”) and are based on the July 1, 2022 actuarial valuations, as adopted by the PEBA Board and Budget and Control Board, which utilized membership data as of July 1, 2022. The total pension liability was rolled-forward from the valuation date to the plan’s fiscal year ended June 30, 2024, using generally accepted actuarial principles. Information included in the following schedules is based on the certification provided by GRS.

The net pension liability is calculated separately for each System and represents that particular System’s total pension liability determined in accordance with GASB No. 67, less that System’s fiduciary net position. As of June 30, 2024 (measurement date of June 30, 2023), the net pension liability amounts for the Town’s proportionate share of the collective net pension liabilities associated with the SCRS and PORS plans are as follows:

System	Total Pension Liability	Plan Fiduciary Net Position	Employer's Net Pension Liability	Plan Fiduciary Net Position as a Percentage of the Total Pension Liability	Town's Proportionate Share of the Collective Net Pension Liability
SCRS	\$ 28,715,297	\$ 16,840,384	\$ 11,874,913	58.6%	0.049116%
PORS	\$ 20,724,464	\$ 14,048,579	\$ 6,675,885	67.8%	0.219306%

Plan Fiduciary Net Position

Detailed information regarding the fiduciary net position of the plans administered by PEBA is available in the separately issued Annual Comprehensive Financial Report (“ACFR”) containing financial statements and required supplementary information for SCRS and PORS. The ACFR of the Pension Trust Funds is publicly available on PEBA’s Retirement Benefits’ website at [www.retirement.sc.gov](http://www.retirement.sc.gov), or a copy may be obtained by submitting a request to:

PEBA  
P.O. Box 11960  
Columbia, South Carolina 29211-1960

NOTES TO FINANCIAL STATEMENTS

NOTE 13. DEFINED BENEFIT PENSION PLAN (CONTINUED)

Discount Rate

The discount rate used to measure the total pension liability was 7.00%. The projection of cash flows used to determine the discount rate assumed that contributions from participating employers in SCRS and PORS will be made based on the actuarially determined rates based on provisions in the South Carolina State Code of Laws. Based on those assumptions, the Town’s fiduciary net position was projected to be available to make all projected future benefit payments of current plan members. Therefore, the long-term expected rate of return on pension plan investments was applied to all periods of projected benefit payments to determine the total pension liability. The following table presents the sensitivity of the net pension liabilities to changes in the discount rate:

	Sensitivity of the Net Position Liability to Changes in the Discount Rate		
	1% Decrease (6.00%)	Current Discount Rate (7.00%)	1% Increase (8.00%)
SCRS	\$ 15,343,622	\$ 11,874,913	\$ 8,991,986
PORS	9,417,346	6,675,885	4,430,288
Total	\$ 24,760,968	\$ 18,550,798	\$ 13,422,274

Pension Expense

For the fiscal year ended June 30, 2024, the Town recognized its proportionate share of collective pension expense of \$1,172,565 and recognition of deferred amounts from changes in the proportionate share and differences between employer contributions and the proportionate share of total plan employer contributions of \$248,160 for a total of \$1,420,725 for the SCRS plan. Additionally, for the fiscal year ended June 30, 2024, the Town recognized its proportionate share of collective pension expense of \$785,664, and recognition of deferred amounts from changes in the proportionate share and differences between employer contributions and the proportionate share of total plan employer contributions of \$10,274, for a total of \$795,938 for the PORS plan.

## NOTES TO FINANCIAL STATEMENTS

### NOTE 13. DEFINED BENEFIT PENSION PLAN (CONTINUED)

#### *Deferred Outflows and Inflows of Resources Related to Pensions*

At June 30, 2024, the Town reported deferred outflows of resources and deferred inflows of resources related to the SCRS and PORS pension plans, respectively, from the following sources:

	SCRS		PORS		Total	
	Deferred Outflows of Resources	Deferred Inflows of Resources	Deferred Outflows of Resources	Deferred Inflows of Resources	Deferred Outflows of Resources	Deferred Inflows of Resources
<b>Governmental activities</b>						
Differences between expected and actual experience	\$ 206,169	\$ 32,931	\$ 314,173	\$ 82,299	\$ 520,342	\$ 115,230
Net difference between projected and actual earnings on pension plan investments	-	16,255	-	11,457	-	27,712
Assumption changes	181,941	-	145,295	-	327,236	-
Changes in proportion and differences between employer contributions and proportionate share of contributions	497,901	-	52,706	159,177	550,607	159,177
Employer contributions subsequent to the measurement date	619,289	-	421,106	-	1,040,395	-
Total	<u>\$ 1,505,300</u>	<u>\$ 49,186</u>	<u>\$ 933,280</u>	<u>\$ 252,933</u>	<u>\$ 2,438,580</u>	<u>\$ 302,119</u>

Town contributions subsequent to the measurement date of \$619,289 and \$421,106, for the SCRS plan and the PORS plan, respectively, are deferred outflows of resources and will be recognized as a reduction of the net pension liability in the year ending June 30, 2025. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to pensions will be recognized in pension expense as follows:

Measurement Period	Fiscal Year	SCRS	PORS
Ending June 30,	Ending June 30,		
2024	2025	\$ 342,804	\$ 162,837
2025	2026	(96,977)	(166,987)
2026	2027	473,491	296,992
2027	2028	117,507	(33,601)
Total		<u>\$ 836,825</u>	<u>\$ 259,241</u>



## NOTES TO FINANCIAL STATEMENTS

---

### NOTE 14. OTHER INFORMATION

#### A. Commitments and Contingent Liabilities

##### *Litigation*

The Town is subject to various claims and contingencies related to compliance with regulations associated with various grants and other matters arising out of the normal course of business. Management of the Town believes that the ultimate liability, if any, from such claims or contingencies are covered by the Town's insurance policies and are not likely to have a material adverse effect on the Town's operating results, financial condition or liquidity.

##### *Construction Commitments*

In addition to the liabilities enumerated in the balance sheet at June 30 2024, the Town has contractual commitments on uncompleted contracts of \$8,661,386.

##### *Encumbrances*

As discussed in Note 1, encumbrance accounting is utilized to the extent necessary to assure effective budgetary control and accountability and to facilitate effective cash planning and control. At year-end, the amounts of encumbrances expected to be honored upon performance by the vendor in the next year were reported only in the General Fund. These encumbrances totaled \$333,400 for the year ended June 30, 2024.

#### B. Risk Management

The Town is exposed to various risks of losses related to torts; theft of, damage to, and destruction of assets; errors and omissions; injuries to employees; and natural disasters. The Town carries insurance coverage through the State of South Carolina for general liability and auto liability coverage of \$1,000,000 per occurrence, property coverage up to the total insurance values of the property policy, workers' compensation coverage up to statutory limits, and employee health coverage with no lifetime limit. The pools are reinsured through commercial companies for single occurrence claims against general liability, auto liability and property in excess of \$60,000 and \$300,000 up to statutory limits for workers' compensation. The pools are reinsured for annual employee health claims in excess of \$150,000. The property liability pool has an aggregate limit for the total property losses in a single year, with the reinsurance limit based upon a percentage of the total insurance values.

There have been no significant reductions in insurance coverage in the prior year, and settled claims have not exceeded coverage in any of the past three fiscal years.

## REQUIRED SUPPLEMENTARY INFORMATION

## TOWN OF BLUFFTON, SOUTH CAROLINA

### REQUIRED SUPPLEMENTARY INFORMATION FOR THE FISCAL YEAR ENDED JUNE, 2024

#### SCHEDULE OF PROPORTIONATE SHARE OF THE NET PENSION LIABILITY SOUTH CAROLINA RETIREMENT SYSTEM

<u>Plan Year Ended June 30,</u>	<u>Town's proportion of the net pension liability</u>	<u>Town's proportionate share of the net pension liability</u>	<u>Town's covered payroll</u>	<u>Town's share of the net pension liability as a percentage of its covered payroll</u>	<u>Plan fiduciary net position as a percentage of the total pension liability</u>
2023	0.049116%	\$ 11,874,913	\$ 6,209,834	191.2%	58.6%
2022	0.047134%	11,426,400	5,633,505	202.8%	57.1%
2021	0.046503%	10,063,814	4,454,142	225.9%	60.7%
2020	0.044783%	11,442,849	4,996,106	229.0%	54.1%
2019	0.043852%	9,825,842	4,768,301	206.1%	54.1%
2018	0.043852%	9,825,842	4,544,792	216.2%	54.1%
2017	0.043464%	9,784,445	4,385,398	223.1%	53.3%
2016	0.041865%	8,942,302	4,054,074	220.6%	52.9%
2015	0.040187%	7,621,658	3,768,002	202.3%	57.0%

#### SCHEDULE OF PROPORTIONATE SHARE OF THE NET PENSION LIABILITY POLICE OFFICERS' RETIREMENT SYSTEM

<u>Plan Year Ended June 30,</u>	<u>Town's proportion of the net pension liability</u>	<u>Town's proportionate share of the net pension liability</u>	<u>Town's covered payroll</u>	<u>Town's share of the net pension liability as a percentage of its covered payroll</u>	<u>Plan fiduciary net position as a percentage of the total pension liability</u>
2023	0.219306%	\$ 6,675,885	\$ 3,842,445	173.7%	67.8%
2022	0.217717%	6,529,288	3,456,867	188.9%	66.4%
2021	0.227654%	5,857,346	2,902,305	201.8%	70.4%
2020	0.230275%	7,636,298	3,478,642	219.5%	58.8%
2019	0.228060%	6,462,170	3,088,033	209.3%	61.7%
2018	0.228060%	6,462,170	3,156,690	204.7%	61.7%
2017	0.249090%	6,823,999	3,354,450	203.4%	60.9%
2016	0.225660%	5,723,809	2,407,795	237.7%	60.4%
2015	0.170920%	3,272,235	2,055,787	159.2%	64.6%
2014	0.170920%	3,272,235	2,055,787	159.2%	67.6%

# TOWN OF BLUFFTON, SOUTH CAROLINA

## REQUIRED SUPPLEMENTARY INFORMATION FOR THE YEAR ENDED JUNE 30, 2024

### SCHEDULE OF CONTRIBUTIONS SOUTH CAROLINA RETIREMENT SYSTEM

Year Ended June 30,	Statutorily required contribution	Contributions relative to statutorily required contribution	Contribution deficiency (excess)	Town's covered payroll	Contributions as a percentage of covered payroll
<b>2024</b>	\$ 619,289	\$ 619,289	\$ -	\$ 6,880,989	9.00%
2023	558,886	558,886	-	6,209,834	9.00%
2022	507,015	507,015	-	5,633,505	9.00%
2021	686,383	686,383	-	4,454,142	15.41%
2020	769,900	769,900	-	4,996,106	15.41%
2019	687,112	687,112	-	4,768,301	14.41%
2018	616,274	616,274	-	4,544,792	13.56%
2017	506,952	506,952	-	4,385,398	11.56%
2016	448,381	448,381	-	4,054,074	11.06%
2015	410,713	410,713	-	3,768,002	10.90%

### SCHEDULE OF CONTRIBUTIONS POLICE OFFICERS' RETIREMENT SYSTEM

Year Ended June 30,	Statutorily required contribution	Contributions relative to statutorily required contribution	Contribution deficiency (excess)	Town's covered payroll	Contributions as a percentage of covered payroll
<b>2024</b>	\$ 421,106	\$ 421,106	\$ -	\$ 4,319,035	9.75%
2023	374,638	374,638	-	3,842,445	9.75%
2022	337,045	337,045	-	3,456,867	9.75%
2021	517,771	517,771	-	2,902,305	17.84%
2020	620,590	620,590	-	3,478,642	17.84%
2019	520,025	520,025	-	3,088,033	16.84%
2018	506,333	506,333	-	3,156,690	16.04%
2017	477,674	477,674	-	3,354,450	14.24%
2016	395,280	395,280	-	2,407,795	16.42%
2015	322,885	322,885	-	2,055,787	15.71%

## OTHER SUPPLEMENTARY INFORMATION

## **COMBINING AND INDIVIDUAL FUND FINANCIAL STATEMENTS AND SCHEDULES**

# TOWN OF BLUFFTON, SOUTH CAROLINA

Attac

Section XI. Item #4.

## COMBINING BALANCE SHEET NONMAJOR GOVERNMENTAL FUNDS JUNE 30, 2024

Special Revenue Funds					
	Boat Ramp Fund	State Accommodations Tax Fund	Vehicle Tag Fee Fund	Seized and Forfeited Assets Fund	Total Nonmajor Governmental Funds
<b>ASSETS</b>					
Cash	\$ 155,804	\$ 1,671,893	\$ 26,190	\$ -	\$ 1,853,887
Restricted cash and cash equivalents	-	-	-	28,803	28,803
Other receivables	-	457,086	1,202	-	458,288
Due from other funds	10,826	57,650	6,461	800	75,737
Total assets	<u>\$ 166,630</u>	<u>\$ 2,186,629</u>	<u>\$ 33,853</u>	<u>\$ 29,603</u>	<u>\$ 2,416,715</u>
<b>TOTAL LIABILITIES AND FUND BALANCES</b>					
<b>LIABILITIES</b>					
Accounts payable	\$ -	\$ 893,992	\$ -	\$ 12,927	\$ 906,919
Due to other funds	42,000	290,305	-	2,137	334,442
Total liabilities	<u>42,000</u>	<u>1,184,297</u>	<u>-</u>	<u>15,064</u>	<u>1,241,361</u>
<b>FUND BALANCES</b>					
Restricted:					
Public safety	-	-	33,853	14,539	48,392
Tourism	-	1,002,332	-	-	1,002,332
Capital projects	124,630	-	-	-	124,630
Total fund balances	<u>124,630</u>	<u>1,002,332</u>	<u>33,853</u>	<u>14,539</u>	<u>1,175,354</u>
Total liabilities and fund balances	<u>\$ 166,630</u>	<u>\$ 2,186,629</u>	<u>\$ 33,853</u>	<u>\$ 29,603</u>	<u>\$ 2,416,715</u>



# TOWN OF BLUFFTON, SOUTH CAROLINA

Attac

Section XI. Item #4.

## COMBINING STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES NONMAJOR GOVERNMENTAL FUNDS FOR THE FISCAL YEAR ENDED JUNE 30, 2024

	Special Revenue Funds				Total Nonmajor Governmental Funds
	Boat Ramp Fund	State Accommodations Tax Fund	Vehicle Tag Fee Fund	Seized and Forfeited Assets Fund	
<b>Revenues</b>					
Accommodations taxes	\$ -	\$ 1,099,301	\$ -	\$ -	\$ 1,099,301
Development fees	10,650	-	-	-	10,650
Tag fees	-	-	1,528	-	1,528
Interest income	309	22,107	278	127	22,821
Confiscated revenues	-	-	-	962	962
Total revenues	10,959	1,121,408	1,806	1,089	1,135,262
<b>Expenditures</b>					
Current:					
Community development	25	1,582,300	-	-	1,582,325
Total expenditures	25	1,582,300	-	-	1,582,325
Excess (deficiency) of revenues over (under) expenditures	10,934	(460,892)	1,806	1,089	(447,063)
<b>Other financing uses</b>					
Transfers out	-	(78,715)	-	-	(78,715)
Total other financing uses	-	(78,715)	-	-	(78,715)
Net change in fund balances	10,934	(539,607)	1,806	1,089	(525,778)
<b>Fund balances, beginning of year</b>	113,696	1,541,939	32,047	13,450	1,701,132
<b>Fund balances, end of year</b>	\$ 124,630	\$ 1,002,332	\$ 33,853	\$ 14,539	\$ 1,175,354

# TOWN OF BLUFFTON, SOUTH CAROLINA

## SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES - BUDGET AND ACTUAL - GAAP BASIS GENERAL FUND FOR THE FISCAL YEAR ENDED JUNE 30, 2024

	Budget		Actual	Variance With Final Budget
	Original	Final		
<b>Revenue</b>				
Property tax	\$ 8,729,54	\$ 9,292,64	\$ 10,319,43	\$ 1,026,78
Licenses and permits:				
Franchise fee	3,125,45	3,125,45	3,362,30	236,851
Business license	3,559,45	3,559,45	4,500,58	941,122
MASC telecommunication	50,000	50,000	56,434	6,434
MASC insurance tax collectio	2,906,37	2,906,37	4,616,571	1,710,19
Building permit	2,474,72	2,474,72	1,953,582	(521,138)
pplication fee	50,000	50,000	87,941	37,941
Total licenses and permit	12,166,00	12,166,00	14,577,41	2,411,40
Intergovernmenta				
State shared revenues				
Local government fun	300,00	300,00	681,881	381,881
Federal grants	190,00	190,00	591,81	401,81
Total state shared revenue	490,00	490,00	1,273,691	783,691
Other local governments:				
School resource officer	1,648,55	1,423,17	418,32	(1,004,856)
School crossing guard	70,212	70,212	80,242	10,030
Total other local government	1,718,76	1,493,391	498,56	(994,826)
Total intergovernmenta	2,208,76	1,983,391	1,772,25	(211,135)
Service revenues:				
Contract police service	-	225,37	231,99	6,618
Development fee	586,30	586,30	644,28	57,985
Total service revenues	586,30	811,68	876,28	64,603
Fees and fines:				
Municipal cour	100,00	100,00	117,21	17,213
Victims assistance	15,000	15,000	17,971	2,971
Check fee	-	-	634,680	634,680
Total fees and fine	115,00	115,00	769,86	654,86
Miscellaneous				
Insurance proceed	-	-	100,95	100,95
Miscellaneous	100,00	100,00	46,775	(53,225)
Rental income	20,000	20,000	60,270	40,270
Interest incom	25,000	25,000	705,94	680,94
Total miscellaneous	145,00	145,00	913,951	768,951
Total revenue	23,950,62	24,513,72	29,229,19	4,715,471
<b>Expenditure</b>				
Current:				
Legislativ	421,00	446,29	393,66	52,623
Economic developmen	884,91	884,91	1,149,42	(264,504)
Executiv	1,385,97	1,494,87	1,450,22	44,659
Human resource	545,122	647,972	546,001	101,971
Non-departmenta	3,297,78	3,545,20	3,003,63	541,57
Financ	1,171,08	1,171,08	1,003,11	167,96
Municipal cour	105,84	105,84	92,714	13,134
Municipal judge	485,421	485,421	464,77	20,642
Information technolog	2,062,76	2,352,76	1,838,04	514,72
Facilities and asset managemen	2,152,64	2,152,64	2,069,55	83,089
Project managemen	1,055,29	971,29	786,83	184,46
Growth managemen	286,962	286,962	250,56	36,398
Planning and environmental sustainabilit	1,510,56	1,576,93	1,470,971	105,96
Building safet	1,004,15	1,027,78	915,61	112,16
Polic	10,195,43	10,486,27	10,315,73	170,53
Debt service:				
Principal retiremen	521,50	522,44	589,04	(66,604)
Interes	6,818	6,818	38,963	(32,145)
Total expenditure	27,093,32	28,165,54	26,378,89	1,786,65
Excess (deficiency) of revenues over (under) expenditures	(3,142,700)	(3,651,821)	2,850,30	6,502,12
<b>Other financing sources (uses)</b>				
Transfers in	5,725,436	7,194,557	2,714,352	(4,480,205)
Transfers out	(2,582,736)	(3,542,736)	(2,638,407)	904,329
Leases	-	-	1,472,832	1,472,832
Total other financing sources, net	3,142,700	3,651,821	1,548,77	(2,103,044)
Net change in fund balances	-	-	4,399,081	4,399,081
<b>Fund balances, beginning of year</b>	29,623,96	29,623,96	29,623,96	-
<b>Fund balances, end of year</b>	\$ 29,623,964	\$ 29,623,964	\$ 34,023,045	\$ 4,399,081

## TOWN OF BLUFFTON, SOUTH CAROLINA

### SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES - BUDGET AND ACTUAL - GAAP BASIS CAPITAL IMPROVEMENT PROGRAMS FUND FOR THE FISCAL YEAR ENDED JUNE 30, 2024

	Budget			Variance With
	Original	Final	Actual	Final Budget
<b>Revenues</b>				
Other revenues:				
Intergovernmental	\$ 77,420	\$ 77,420	\$ 626,100	\$ 548,680
Interest income	-	-	3,530	3,530
Donations	-	-	16,771	16,771
Development fees	300,440	300,440	306,900	6,460
Total other revenues	377,860	377,860	953,301	575,441
State revenues	500,000	500,000	200,000	(300,000)
Federal revenues	200,000	2,200,000	3,407,743	1,207,743
Total revenues	1,077,860	3,077,860	4,561,044	1,483,184
<b>Expenditures</b>				
Current:				
Affordable Housing Project	1,708,672	1,676,044	76,829	1,599,215
BIS Neighborhood Sidewalks and Lighting	-	186,263	62,110	124,153
Boundary Street Lighting	-	44,403	21,179	23,224
Boundary Street Streetscape	893,050	936,781	5,003	931,778
Bridge Street Streetscape	110,490	676,417	91,934	584,483
Buck Island - Simmonsville Sewer Phase 5	2,400,000	2,551,436	2,015,474	535,962
Buckwalter Place Multi-County Commerce Park Ph. 2	3,327,940	3,504,420	277,334	3,227,086
Calhoun Street Streetscape	447,837	677,517	51,383	626,134
Community Safety Cameras	68,500	68,500	21,236	47,264
Comprehensive Drainage Plan Improvements	228,100	287,517	84,674	202,843
Document Management - Phase 2	290,000	-	-	-
Ghost Roads	376,000	388,177	8,757	379,420
Goethe - Shults Neighborhood Improvements Ph. 2	-	297,500	8,094	289,406
Historic District Sewer Extension Phase 2	-	323,446	232,980	90,466
Historic District Sewer Extension Phase 3	-	199,124	162,940	36,184
Historic District Sewer Extension Phase 4	520,140	558,963	1,302	557,661
Historic District Sewer Extension Phase 5	468,480	503,514	1,064	502,450
Historic District Sewer Extension Phase 6	579,600	621,637	1,866	619,771
Land Acquisition	3,998,175	4,993,220	2,536,118	2,457,102
Law Enforcement Center Facility Improvements	156,500	194,985	79,444	115,541
May River Action Plan Imprvs Restrtn/Water Qlty Proj	459,000	459,000	84,741	374,259
Network Improvements	130,000	139,971	119,407	20,564
New River Trail	28,195	2,103,750	409,707	1,694,043
New Riverside Park/Barn Site	4,880,693	5,976,016	4,385,096	1,590,920
New Riverside Village Park	288,000	288,000	235,543	52,457
Oscar Frazier Park	1,030,000	1,115,419	591,452	523,967
Oyster Factory Park	1,041,110	1,447,242	1,184,998	262,244
Park Improvements	354,700	500,138	328,697	171,441
Pathway Pedestrian Safety Improvements	378,121	660,371	126,130	534,241
Pritchard Street Drainage Improvements	1,442,706	1,452,696	41,854	1,410,842
Public Art Program	-	100,000	269	99,731
Sarah Riley Hooks Cottage	345,217	364,432	96,885	267,547
Sewer Connections Policy	384,000	1,137,776	639,045	498,731
Squire Pope Carriage House	1,035,586	1,621,444	1,390,922	230,522
Stoney Crest Campground/Old Palmetto Bluff Rd	419,099	419,099	-	419,099
Town Hall Improvements	250,000	300,000	235,113	64,887
Townwide Wayfinding Signage System	40,000	40,000	-	40,000
Wharf Street Lighting	185,750	244,560	-	244,560
Total expenditures	28,265,661	37,059,778	15,609,580	21,450,198
Deficiency of revenues under expenditures	(27,187,801)	(33,981,918)	(11,048,536)	22,933,382
<b>Other financing sources</b>				
Transfers in	27,765,661	34,559,778	12,747,910	(21,811,868)
Total other financing sources	27,765,661	34,559,778	12,747,910	(21,811,868)
Net change in fund balances	577,860	577,860	1,699,374	1,121,514
<b>Fund balances, beginning of year</b>	7,414,576	7,414,576	7,414,576	-
<b>Fund balances, end of year</b>	\$ 7,992,436	\$ 7,992,436	\$ 9,113,950	\$ 1,121,514

TOWN OF BLUFFTON, SOUTH CAROLINA

SCHEDULE OF REVENUES, EXPENDITURES AND  
CHANGES IN FUND BALANCES - BUDGET AND ACTUAL - GAAP BASIS  
DEBT SERVICE FUND  
FOR THE YEAR FISCAL ENDED JUNE 30, 2024

	Budget			Variance With
	Original	Final	Actual	Final Budget
<b>Revenues</b>				
Property taxes	\$ 3,580,840	\$ 3,580,840	\$ 4,709,559	\$ 1,128,719
MID Fees	365,860	365,860	370,800	4,940
Interest income	4,400	4,400	118,324	113,924
Total revenues	3,951,100	3,951,100	5,198,683	1,247,583
<b>Expenditures</b>				
Other miscellaneous	50	50	-	50
Debt service:				
Principal retirement	1,590,153	1,590,153	1,590,153	-
Interest	655,561	655,561	655,561	-
Total expenditures	2,245,764	2,245,764	2,245,714	50
Excess of revenues over expenditures	1,705,336	1,705,336	2,952,969	1,247,633
<b>Other financing sources (uses)</b>				
Transfers in	3,541,805	3,952,124	293,800	(3,658,324)
Transfers out	(5,247,141)	(5,657,460)	(781,387)	4,876,073
Total other financing uses, net	(1,705,336)	(1,705,336)	(487,587)	1,217,749
Net change in fund balances	-	-	2,465,382	2,465,382
<b>Fund balances, beginning of year</b>	9,332,876	9,332,876	9,332,876	-
<b>Fund balances, end of year</b>	\$ 9,332,876	\$ 9,332,876	\$ 11,798,258	\$ 2,465,382

**TOWN OF BLUFFTON, SOUTH CAROLINA**

Attac

Section XI. Item #4.

**SCHEDULE OF REVENUES, EXPENDITURES AND  
CHANGES IN FUND BALANCES - BUDGET AND ACTUAL - GAAP BASIS  
STORMWATER FUND  
FOR THE FISCAL YEAR ENDED JUNE 30, 2024**

	<b>Budget</b>			<b>Variance With</b>
	<b>Original</b>	<b>Final</b>	<b>Actual</b>	<b>Final Budget</b>
<b>Revenues</b>				
Licenses and permits:				
Stormwater fees	\$ 2,581,205	\$ 2,581,205	\$ 2,607,109	\$ 25,904
Miscellaneous	-	-	973	973
Total revenues	<u>2,581,205</u>	<u>2,581,205</u>	<u>2,608,082</u>	<u>26,877</u>
<b>Expenditures</b>				
Personnel:				
Stormwater	788,797	788,797	819,255	(30,458)
Operating costs:				
Stormwater	711,549	735,275	425,620	309,655
Capital outlay	-	26,640	27,050	(410)
Debt service:				
Principal retirement	-	-	59,769	(59,769)
Interest	-	-	6,002	(6,002)
Total expenditures	<u>1,500,346</u>	<u>1,550,712</u>	<u>1,337,696</u>	<u>213,016</u>
Excess of revenues over expenditures	<u>1,080,859</u>	<u>1,030,493</u>	<u>1,270,386</u>	<u>239,893</u>
<b>Other financing sources (uses)</b>				
Transfers in	619,907	804,814	-	(804,814)
Transfers out	(1,700,766)	(1,835,307)	(864,724)	970,583
Total other financing uses, net	<u>(1,080,859)</u>	<u>(1,030,493)</u>	<u>(864,724)</u>	<u>165,769</u>
Net change in fund balances	<u>-</u>	<u>-</u>	<u>405,662</u>	<u>405,662</u>
<b>Fund balances, beginning of year</b>	<u>3,613,300</u>	<u>3,613,300</u>	<u>3,613,300</u>	<u>-</u>
<b>Fund balances, end of year</b>	<u><u>\$ 3,613,300</u></u>	<u><u>\$ 3,613,300</u></u>	<u><u>\$ 4,018,962</u></u>	<u><u>\$ 405,662</u></u>

## **SUPPLEMENTAL SECTION**

**UNIFORM SCHEDULE OF COURT FINES, ASSESSMENTS AND SURCHARGES (per ACT 96)**  
**For The Year Ended June 30, 2024**

FOR THE STATE TREASURER'S OFFICE:

<b>MUNICIPAL FUNDS COLLECTED BY CLERK OF COURT</b>	<b><u>Municipal</u> <u>Court</u></b>	<b><u>Total</u></b>
<b>Court Fines and Assessments:</b>		
Court fines and assessments collected	\$ 306,686	\$ 306,686
Court fines and assessments remitted to State Treasurer	165,339	165,339
<b>Total Court Fines and Assessments retained</b>	<b>\$ 141,347</b>	<b>\$ 141,347</b>
<b>Surcharges and Assessments retained for victim services:</b>		
Surcharges collected and retained	\$ 3,503	\$ 3,503
Assessments retained	14,468	14,468
<b>Total Surcharges and Assessments retained for victim services</b>	<b>\$ 17,971</b>	<b>\$ 17,971</b>

FOR THE DEPARTMENT OF CRIME VICTIM COMPENSATION (DCVC)

<b><u>VICTIM SERVICE FUNDS COLLECTED</u></b>	<b><u>Municipal</u></b>	<b><u>Total</u></b>
<b>Carryforward from Previous Year – Beginning Balance</b>	<b>\$ -</b>	<b>\$ -</b>
<b><u>Victim Service Revenue:</u></b>		
Victim Service Fines Retained by Town	-	-
Victim Service Assessments Retained by Town	14,468	14,468
Victim Service Surcharges Retained by Town	3,503	3,503
Interest Earned	-	-
Grant Funds Received	-	-
Grant from:		-
General Funds Transferred to Victim Service Fund	72,433	72,433
<b>Contribution Received from Victim Service Contracts:</b>		
(1) Town of	-	-
(2) Town of	-	-
(3) City of	-	-
<b>Total Funds Allocated to Victim Service Fund + Beginning Balance (A)</b>	<b>\$ 90,404</b>	<b>\$ 90,404</b>



**UNIFORM SCHEDULE OF COURT FINES, ASSESSMENTS AND SURCHARGES (per ACT 96)**  
**For The Year Ended June 30, 2024**

<b><u>Expenditures for Victim Service Program:</u></b>	<b><u>Municipal</u></b>	<b><u>Total</u></b>
Salaries and Benefits	\$ 89,863	\$ 89,863
Operating Expenditures	541	541
<b>Victim Service Contract(s):</b>		
(1) Entity's Name		-
(2) Entity's Name		-
<b>Victim Service Donation(s):</b>		
(1) Domestic Violence Shelter:	-	-
(2) Rape Crisis Center:	-	-
(3) Other local direct crime victims service agency:	-	-
Transferred to General Fund	-	-
<b>Total Expenditures from Victim Service Fund/Program (B)</b>	<b>\$ 90,404</b>	<b>\$ 90,404</b>
Total Victim Service Funds Retained by Municipal/County Treasurer (A-B)	\$ -	\$ -
<b>Less: Prior Year Fund Deficit Repayment</b>	-	-
<b>Carryforward Funds – End of Year</b>	<b>\$ -</b>	<b>-</b>

## STATISTICAL SECTION

**STATISTICAL SECTION  
(UNAUDITED)**

This part of the Town of Bluffton's Annual Comprehensive Financial Report represents detailed information as a context for understanding what the information in the financial statements, note disclosures and required supplementary information says about the Town's overall financial health.

<b><u>Contents</u></b>	<b><u>Pages</u></b>
<b>Financial Trends</b> <i>These schedules contain trend information to help the reader understand how the Town's financial performance and well-being have changed over time.</i>	70 – 74
<b>Revenue Capacity</b> <i>These schedules contain information to help the reader assess the factors affecting the Town's ability to generate its property and sales taxes.</i>	75 – 80
<b>Debt Capacity</b> <i>These schedules present information to help the reader assess the affordability of the Town's current levels of outstanding debt and the Town's abilities to issue additional debt in the future.</i>	81 – 85
<b>Demographic and Economic Information</b> <i>These schedules offer demographic and economic indicators to help the reader understand the environment within which the Town's financial activities take place.</i>	86 and 87
<b>Operating Information</b> <i>These schedules contain information about the Town's operations and resources to help the reader understand how the Town's financial information relates to the services the Town provides and activities it performs.</i>	88 – 90

**Sources:** Unless otherwise noted, the information in these schedules is derived from the Annual Financial Statements audit reports for the relevant year.

# TOWN OF BLUFFTON, SOUTH CAROLINA

## SCHEDULE 1 NET POSITION BY COMPONENT LAST TEN FISCAL YEARS *(accrual basis of accounting)*

	Fiscal Year									
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Governmental activities										
Net investment in capital assets	\$ 11,556,509	\$ 11,494,116	\$ 13,698,001	\$ 18,219,570	\$ 22,392,823	\$ 24,422,794	\$ 26,497,134	\$ 27,384,926	\$ 30,557,167	\$ 39,722,238
Restricted	8,501,810	10,006,700	8,494,579	8,845,823	10,490,769	12,814,471	17,008,185	25,716,856	33,080,296	35,399,479
Unrestricted	1,316,954	4,208,504	6,039,836	3,054,693	2,902,157	3,132,113	6,783,599	11,757,213	14,992,220	21,106,515
Total governmental activities net position	<u>\$ 21,375,273</u>	<u>\$ 25,709,320</u>	<u>\$ 28,232,416</u>	<u>\$ 30,120,086</u>	<u>\$ 35,785,749</u>	<u>\$ 40,369,378</u>	<u>\$ 50,288,918</u>	<u>\$ 64,858,995</u>	<u>\$ 78,629,683</u>	<u>\$ 96,228,232</u>

# TOWN OF BLUFFTON, SOUTH CAROLINA

## SCHEDULE 2 CHANGES IN NET POSITION LAST TEN FISCAL YEARS (accrual basis of accounting)

	Fiscal Year									
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
<b>Expenses</b>										
Governmental activities										
General government:										
Administration	\$ 3,675,493	\$ 4,210,681	\$ 4,858,208	\$ 4,966,547	\$ 6,273,450	\$ 6,202,766	\$ 6,656,915	\$ 7,164,020	\$ 8,356,307	\$ 9,740,094
Judicial	278,425	302,390	325,019	349,155	408,166	446,349	438,107	951,917	488,612	559,284
Planning	744,605	873,476	801,474	950,748	1,269,985	1,142,227	1,247,888	2,291,696	2,060,638	2,222,881
Public safety:										
Building safety	962,685	981,279	1,036,905	1,057,626	924,154	918,640	917,401	962,165	1,089,713	1,231,910
Police	4,801,530	5,691,428	6,720,715	6,720,974	6,471,843	7,383,736	7,344,682	7,235,621	8,150,819	10,985,607
Public works	1,034,327	938,380	1,417,406	1,111,464	1,606,484	1,631,797	2,009,698	1,928,569	2,162,371	2,205,145
Environmental protection/stormwater management	652,579	963,939	800,781	826,253	923,714	1,190,662	1,045,730	1,014,708	1,209,120	1,309,369
Engineering/project management	876,330	921,486	1,170,935	6,164,446	1,376,125	1,387,003	1,524,434	886,363	890,555	820,177
Community development	1,027,545	2,694,505	4,364,665	732,980	3,074,469	3,655,085	2,931,008	2,680,256	2,274,641	1,830,251
Interest on long-term debt	684,047	568,805	539,244	495,484	460,301	505,359	600,358	235,891	538,926	554,812
Total governmental activities expenses	\$ 14,737,566	\$ 18,146,369	\$ 22,035,352	\$ 23,375,677	\$ 22,788,691	\$ 24,463,624	\$ 24,716,221	\$ 25,351,206	\$ 27,221,702	\$ 31,459,530
<b>Program revenues (see Schedule 3)</b>										
Governmental activities										
Charges for services:										
General government:										
Administration	\$ 5,465,905	\$ 5,764,361	\$ 6,127,510	\$ 6,729,624	\$ 7,436,407	\$ 7,586,183	\$ 8,045,415	\$ 9,640,699	\$ 10,879,823	\$ 12,535,891
Judicial	277,388	278,360	320,564	256,426	854,685	777,341	1,110,475	1,099,867	804,015	769,864
Planning	898,669	1,055,317	1,324,816	1,023,161	1,229,496	900,352	1,250,293	1,097,291	595,319	742,879
Public safety:										
Building safety	1,608,131	2,118,220	2,063,472	2,059,110	2,158,592	1,909,129	2,650,798	3,178,935	2,008,113	1,953,582
Police	65,820	59,585	70,910	80,014	107,752	70,901	594,003	97,774	101,827	233,522
Stormwater management	-	-	-	-	-	-	-	2,593,483	2,494,343	2,607,109
Community development	343,800	642,600	521,100	607,500	402,300	354,600	590,400	509,400	242,100	306,900
Operating grants and contributions	317,366	480,525	691,119	639,252	508,799	338,115	655,425	1,343,587	1,628,791	1,274,653
Capital grants and contributions	1,322,203	2,614,001	2,579,042	1,808,630	2,010,096	2,627,022	3,580,765	710,702	694,542	3,607,743
Total governmental activities program revenues	\$ 10,299,282	\$ 13,012,969	\$ 13,698,533	\$ 13,203,717	\$ 14,708,127	\$ 14,563,643	\$ 18,477,574	\$ 20,271,738	\$ 19,448,873	\$ 24,032,143
<b>Net (expense) revenue</b>										
Total governmental activities net expense	\$ (4,438,284)	\$ (5,133,400)	\$ (8,336,819)	\$ (10,171,960)	\$ (8,080,564)	\$ (9,899,981)	\$ (6,238,647)	\$ (5,079,468)	\$ (7,772,829)	\$ (7,427,387)
<b>General revenues and other changes in net position</b>										
Governmental activities										
Taxes:										
Property taxes	\$ 6,089,064	\$ 6,716,062	\$ 7,158,104	\$ 7,666,528	\$ 8,734,446	\$ 9,580,551	\$ 10,362,658	\$ 11,714,237	\$ 13,285,424	\$ 15,028,989
Other taxes	2,015,182	2,224,751	2,860,650	3,186,291	3,478,490	3,203,461	4,697,165	6,673,707	6,434,566	6,946,537
Intergovernmental revenue	634,044	615,847	686,837	904,018	1,012,759	1,461,571	861,609	946,083	1,040,694	1,495,465
Investment earnings	12,963	12,200	31,460	40,103	50,675	77,060	50,743	70,492	482,307	1,329,198
Gain/(loss) on sale of capital assets	-	(171,500)	-	(14,328)	-	-	-	-	-	-
Miscellaneous	176,981	70,087	122,864	277,018	469,858	160,967	186,012	245,026	300,526	225,747
Total governmental activities	\$ 8,928,234	\$ 9,467,447	\$ 10,859,915	\$ 12,059,630	\$ 13,746,228	\$ 14,483,610	\$ 16,158,187	\$ 19,649,545	\$ 21,543,517	\$ 25,025,936
<b>Change in net position</b>										
Governmental activities	\$ 4,489,950	\$ 4,334,047	\$ 2,523,096	\$ 1,887,670	\$ 5,665,664	\$ 4,583,629	\$ 9,919,540	\$ 14,570,077	\$ 13,770,688	\$ 17,598,549

## TOWN OF BLUFFTON, SOUTH CAROLINA

### SCHEDULE 3 PROGRAM REVENUES BY FUNCTION/PROGRAM LAST TEN FISCAL YEARS *(accrual basis of accounting)*

Function/Program	Fiscal Year									
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Governmental activities										
General government:										
Administration	\$ 5,465,905	\$ 5,764,361	\$ 6,127,510	\$ 6,729,624	\$ 7,436,407	\$ 7,586,183	\$ 8,045,415	\$ 9,640,699	\$ 10,879,823	\$ 12,535,891
Municipal court	277,388	278,360	320,564	256,426	854,685	777,341	1,110,475	1,099,867	804,015	769,864
Planning	898,669	1,055,317	1,324,816	1,023,161	1,229,496	900,352	1,250,293	1,097,291	595,319	742,879
Public safety:										
Building safety	1,608,131	2,118,220	2,063,472	2,059,110	2,158,592	1,909,129	2,650,798	3,178,935	2,008,113	1,953,582
Police	65,820	59,585	70,910	80,014	107,752	70,901	594,003	97,774	101,827	233,522
Stormwater management	-	-	-	-	-	-	-	2,593,483	2,494,343	2,607,109
Environmental Protection/Stormwater Management	-	-	-	-	-	-	-	-	-	-
Engineering	-	-	-	-	-	-	-	-	-	-
Capital grants and contributions	1,322,203	2,614,001	2,579,042	1,808,630	2,010,096	2,627,022	3,580,765	710,702	694,542	3,607,743
Total governmental activities	<u>\$ 10,299,282</u>	<u>\$ 13,012,969</u>	<u>\$ 13,698,533</u>	<u>\$ 13,203,717</u>	<u>\$ 14,708,127</u>	<u>\$ 14,563,643</u>	<u>\$ 18,477,574</u>	<u>\$ 20,271,738</u>	<u>\$ 19,448,873</u>	<u>\$ 24,032,143</u>

## TOWN OF BLUFFTON, SOUTH CAROLINA

### SCHEDULE 4 FUND BALANCES - GOVERNMENTAL FUNDS LAST TEN FISCAL YEARS *(modified accrual basis of accounting)*

	Fiscal Year									
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
General Fund:										
Non-spendable	\$ 177,876	\$ 245,442	\$ 253,037	\$ 215,178	\$ 262,573	\$ 339,693	\$ 418,091	\$ 388,110	\$ 633,484	\$ 638,937
Restricted	824,985	860,630	624,615	165,318	150,982	150,983	113,114	91,444	76,263	76,263
Committed	2,333,802	2,673,900	4,229,733	5,698,030	3,566,936	3,682,235	3,638,085	9,130,886	11,018,398	13,389,528
Assigned	-	-	-	-	-	-	-	650,000	1,150,000	1,150,000
Unassigned	8,019,133	10,049,350	10,017,064	8,182,666	10,894,662	12,098,213	17,234,780	14,116,090	16,745,819	18,768,317
Total General Fund	<u>\$ 11,355,796</u>	<u>\$ 13,829,322</u>	<u>\$ 15,124,449</u>	<u>\$ 14,261,192</u>	<u>\$ 14,875,153</u>	<u>\$ 16,271,124</u>	<u>\$ 21,404,070</u>	<u>\$ 24,376,530</u>	<u>\$ 29,623,964</u>	<u>\$ 34,023,045</u>
All Other Governmental Funds:										
Restricted	\$ 7,676,824	\$ 9,146,070	\$ 7,869,964	\$ 8,680,505	\$ 10,339,787	\$ 12,663,488	\$ 21,884,718	\$ 30,572,323	\$ 43,659,443	\$ 40,992,285
Committed	22,200	261,202	1,772,001	162,561	581,791	55,757	68,717	90,108	107,177	125,479
Assigned	1,494,675	1,933,087	1,600,458	1,908,993	1,837,046	2,493,532	2,391,490	4,847,776	2,395,605	4,022,083
Total all other governmental funds	<u>\$ 9,193,699</u>	<u>\$ 11,340,359</u>	<u>\$ 11,242,423</u>	<u>\$ 10,752,059</u>	<u>\$ 12,758,624</u>	<u>\$ 15,212,777</u>	<u>\$ 24,344,925</u>	<u>\$ 35,510,207</u>	<u>\$ 46,162,225</u>	<u>\$ 45,139,847</u>



**TOWN OF BLUFFTON, SOUTH CAROLINA**  
**SCHEDULE 5**  
**CHANGES IN FUND BALANCES - GOVERNMENTAL FUNDS**  
**LAST TEN FISCAL YEARS**  
*(modified accrual basis of accounting)*

	Fiscal Year									
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
<b>Revenues</b>										
Taxes (see Schedule 6)	\$ 1,638,139	\$ 1,896,962	\$ 1,972,006	\$ 10,852,818	\$ 12,212,936	\$ 12,784,012	\$ 15,059,823	\$ 18,387,944	\$ 19,719,990	\$ 21,975,526
Licenses and permits	8,796,439	9,982,960	10,374,179	11,087,574	11,853,795	11,702,407	13,959,116	16,387,277	16,044,724	17,862,222
Fees and fines	279,641	297,783	320,564	256,426	854,685	777,341	1,656,887	1,128,630	806,748	771,392
Charges for services	857,264	1,042,973	1,199,479	983,420	1,208,538	863,211	1,183,918	1,056,742	637,218	886,933
Intergovernmental	711,079	904,097	970,671	967,217	1,063,879	1,486,006	845,478	1,218,806	1,171,825	1,806,546
Grants and entitlements	283,803	1,397,633	1,497,857	813,098	739,989	1,196,249	1,693,784	1,426,366	1,829,052	4,200,515
Investment earnings	13,466	12,702	31,460	40,103	50,675	77,060	50,743	70,492	482,307	1,329,198
Other revenues	181,578	72,955	186,460	277,018	469,858	160,967	186,012	245,026	300,526	225,747
<b>Total revenues</b>	<b>\$ 12,761,409</b>	<b>\$ 15,608,065</b>	<b>\$ 16,552,676</b>	<b>\$ 25,277,674</b>	<b>\$ 28,454,355</b>	<b>\$ 29,047,253</b>	<b>\$ 34,635,761</b>	<b>\$ 39,921,283</b>	<b>\$ 40,992,390</b>	<b>\$ 49,058,079</b>
<b>Expenditures</b>										
Legislative	\$ 126,291	\$ 154,466	\$ 147,754	\$ 152,222	\$ 159,084	\$ 145,606	\$ 105,319	\$ 127,210	\$ 346,363	\$ 393,667
Executive	729,375	911,914	805,686	816,845	925,500	904,947	916,192	493,279	1,301,882	1,450,220
Economic development	248,943	178,005	207,858	350,721	287,800	380,474	371,447	641,074	622,771	1,149,423
Human resources	234,489	286,519	285,411	258,841	320,445	385,606	343,827	316,415	458,625	546,001
Non-departmental	971,594	1,086,435	1,442,473	1,460,311	1,723,552	1,901,339	2,204,399	3,209,113	2,879,995	3,003,637
Finance	614,757	711,162	714,980	736,361	908,668	885,793	939,114	1,233,874	827,284	1,003,117
Municipal court	228,639	238,894	253,192	269,722	330,896	359,046	47,274	229,872	74,587	92,714
Municipal judges	45,809	52,811	52,188	55,783	53,323	51,847	358,875	719,808	412,337	464,779
Information technology	602,567	729,118	1,001,627	931,311	1,461,190	1,166,553	1,294,112	890,397	1,710,365	1,838,044
Public works	938,131	839,274	1,302,326	1,026,545	1,482,283	1,481,690	1,829,154	1,807,194	2,020,167	2,069,556
Environmental protection/stormwater management	619,579	634,437	724,005	740,587	841,506	1,082,133	935,940	950,051	1,151,531	1,244,875
Engineering/project management	510,368	540,200	762,967	929,344	900,996	829,930	844,992	831,551	863,506	786,836
Growth management	336,652	360,106	305,618	227,417	223,186	185,769	222,040	223,579	228,933	250,564
Planning and community development	396,287	839,624	726,953	876,908	1,155,812	1,029,394	1,147,383	1,596,179	1,401,146	1,470,971
Building safety	943,115	578,904	662,922	656,963	633,186	651,005	591,485	672,270	816,790	915,619
Police	4,532,209	5,271,030	6,031,612	5,796,672	5,732,617	6,677,882	6,407,558	7,358,934	7,847,614	10,315,738
Community development	385,019	333,752	346,394	507,345	567,360	509,820	589,410	807,588	1,026,766	1,582,325
Capital outlay	1,278,887	3,154,082	6,681,188	8,996,269	6,627,721	5,178,787	4,299,499	2,530,849	8,591,071	15,636,630
Debt service:										
Interest	662,643	564,365	539,974	505,006	474,327	447,143	675,292	437,855	621,226	700,526
Principal	1,112,874	1,361,064	1,320,759	1,332,590	1,284,376	1,367,893	2,334,602	1,431,783	2,006,444	2,238,966
Cost of issuance	-	-	-	-	-	-	127,328	-	73,200	-
<b>Total expenditures</b>	<b>\$ 15,518,228</b>	<b>\$ 18,826,162</b>	<b>\$ 24,315,887</b>	<b>\$ 26,627,763</b>	<b>\$ 26,093,828</b>	<b>\$ 25,622,657</b>	<b>\$ 26,585,242</b>	<b>\$ 26,508,875</b>	<b>\$ 35,282,603</b>	<b>\$ 47,154,208</b>
Excess (deficiency) of revenues over (under) expenditures	\$ (2,756,819)	\$ (3,218,097)	\$ (7,763,211)	\$ (1,350,089)	\$ 2,360,527	\$ 3,424,596	\$ 8,050,519	\$ 13,412,408	\$ 5,709,787	\$ 1,903,871
<b>Other financing sources (uses)</b>										
Issuance of bonds	8,923,000	-	-	-	-	-	9,485,000	-	9,800,000	-
Underwriter's premium (discount)	(23,075)	-	-	-	-	-	1,485,063	-	-	-
Current refund of existing debt	(9,230,000)	-	-	-	-	-	(4,755,488)	-	165,000	-
Sale of capital assets	-	273,432	588,654	-	-	-	-	-	-	-
Leases	555,900	521,000	325,000	-	260,000	425,528	-	725,334	224,665	1,472,832
Transfers in	1,195,262	1,898,320	4,097,065	9,267,163	5,189,010	4,281,229	4,679,039	6,389,326	6,818,561	15,756,062
Transfers out	(1,195,262)	(1,898,320)	(4,097,065)	(9,267,163)	(5,189,010)	(4,281,229)	(4,679,039)	(6,389,326)	(6,818,561)	(15,756,062)
<b>Total other financing sources (uses)</b>	<b>\$ 225,825</b>	<b>\$ 794,432</b>	<b>\$ 913,654</b>	<b>\$ -</b>	<b>\$ 260,000</b>	<b>\$ 425,528</b>	<b>\$ 6,214,575</b>	<b>\$ 725,334</b>	<b>\$ 10,189,665</b>	<b>\$ 1,472,832</b>
<b>Net change in fund balances</b>	<b>\$ (2,530,994)</b>	<b>\$ (2,423,665)</b>	<b>\$ (6,849,557)</b>	<b>\$ (1,350,089)</b>	<b>\$ 2,620,527</b>	<b>\$ 3,850,124</b>	<b>\$ 14,265,094</b>	<b>\$ 14,137,742</b>	<b>\$ 15,899,452</b>	<b>\$ 3,376,703</b>
Debt service as a percentage of non-capital expenditures	12.8%	10.6%	7.9%	7.7%	7.6%	8.0%	12.4%	12.3%	9.4%	9.3%

TOWN OF BLUFFTON, SOUTH CAROLINA

SCHEDULE 6

TAX REVENUES BY SOURCE - GOVERNMENTAL FUNDS

LAST TEN FISCAL YEARS

(modified accrual basis of accounting)

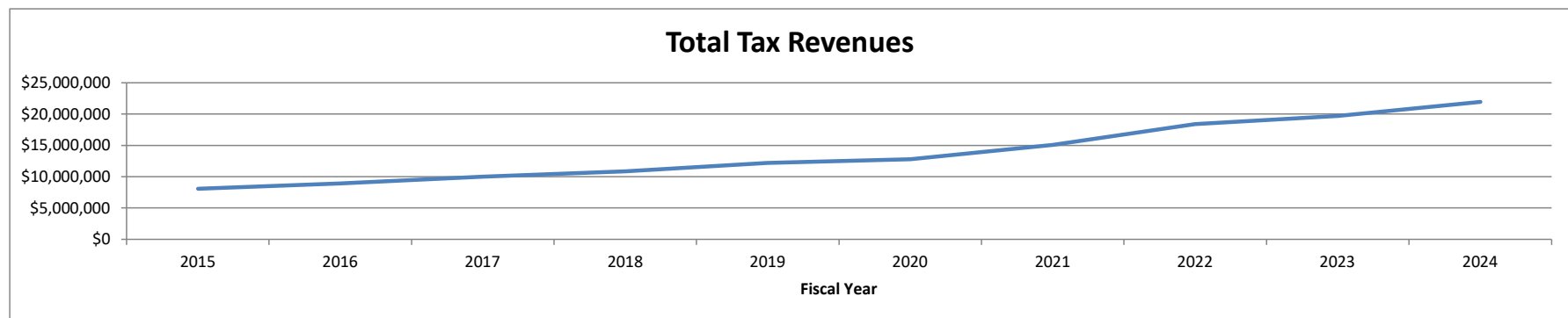
Fiscal Year	Property Tax	State Accommodations Tax	Local Accommodations Tax	Local Hospitality Tax	Total
2015	\$ 6,089,064	\$ 197,398	\$ 328,263	\$ 1,489,521	\$ 8,104,246
2016	6,716,062	219,142	367,470	1,638,139	8,940,813
2017	7,158,104	360,408	603,280	1,896,962	10,018,754
2018	7,666,528	470,744	740,008	1,972,006	10,849,286
2019	8,734,446	474,608	757,694	2,246,188	12,212,936
2020	9,580,551	429,256	701,853	2,072,352	12,784,012
2021	10,362,658	836,319	1,295,141	2,565,705	15,059,823
2022	11,714,237	1,252,541	2,141,481	3,279,685	18,387,944
2023	13,285,424	1,112,833	1,706,975	3,614,758	19,719,990
2024	15,028,989	1,099,301	1,830,195	4,017,041	21,975,526
Change 2015-2024	146.8%	456.9%	457.5%	169.7%	171.2%

Source:

Town Finance Department

Notes:

The State of South Carolina imposes a local 2% Accommodations Tax of which a portion is distributed to the Town on a quarterly basis.



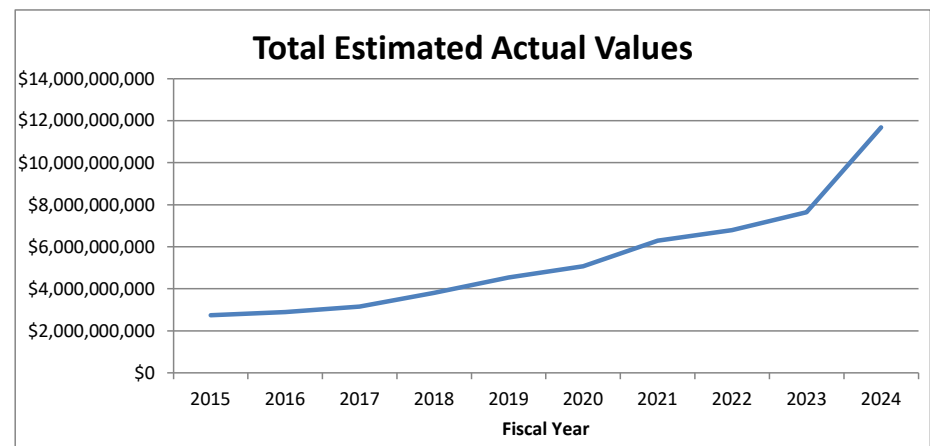
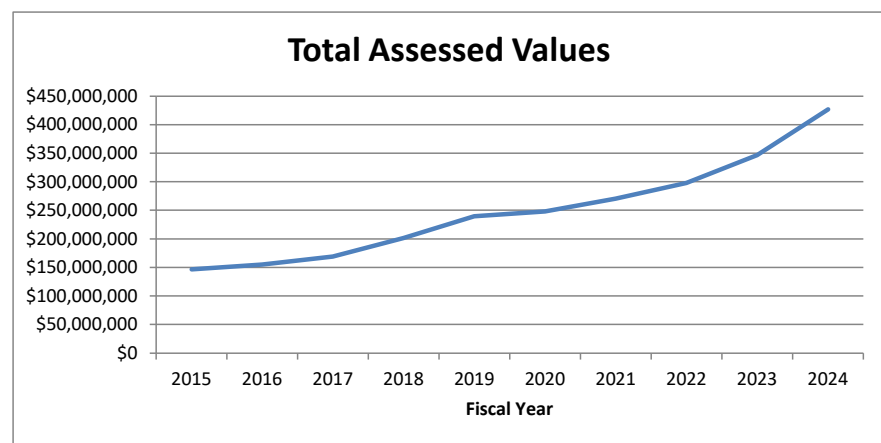
# TOWN OF BLUFFTON, SOUTH CAROLINA

## SCHEDULE 7 ASSESSED VALUE AND ESTIMATED ACTUAL VALUE OF TAXABLE PROPERTY LAST TEN FISCAL YEARS

Fiscal Year	Tax Year	Real and Personal Property		Motor Vehicles		Total Taxable		Total Direct Tax Rate	Taxable Assessed Value as a Percentage of Estimated Actual Taxable Value
		Assessed Value	Estimated Actual Value	Assessed Value	Estimated Actual Value	Assessed Value	Estimated Actual Value		
2015	2014	\$ 136,945,050	\$ 2,590,016,419	\$ 9,549,500	\$ 159,158,333	\$ 146,494,550	\$ 2,749,174,752	44.35	5.33%
2016	2015	140,889,336	2,654,799,615	14,139,420	235,657,000	155,028,756	2,890,456,615	44.35	5.36%
2017	2016	154,685,800	2,919,919,981	14,160,660	236,011,000	168,846,460	3,155,930,981	42.35	5.35%
2018	2017	186,163,210	3,544,760,914	15,459,770	257,662,833	201,622,980	3,802,423,748	40.35	5.30%
2019	2018	222,663,410	4,265,244,781	16,762,779	279,938,407	239,426,189	4,545,183,188	38.50	5.27%
2020	2019	230,101,761	4,762,941,176	18,103,801	301,730,022	248,205,562	5,064,671,198	38.50	4.90%
2021	2020	250,789,550	5,927,521,139	19,552,105	359,489,250	270,341,655	6,287,010,389	38.50	4.30%
2022	2021	278,400,650	6,471,933,139	19,474,858	324,580,963	297,875,508	6,796,514,102	38.50	4.38%
2023	2022	328,054,850	7,327,887,129	18,827,953	314,426,815	346,882,803	7,642,313,944	36.00	4.54%
2024	2023	407,711,720	11,364,117,329	19,513,482	325,875,141	427,225,202	11,689,992,470	36.00	3.65%

Source: Beaufort County Assessor's Office.

**Note:** Property in Beaufort County is reassessed once every five years on average. The last reassessment was tax year 2018. Currently, the County assesses property at 6% and 4% of actual value for real property, 10.5% for personal property, and 6% for motor vehicles. Estimated actual taxable value is calculated by dividing taxable assessed value by those percentages. Tax rates are per \$1,000 of assessed value.



TOWN OF BLUFFTON, SOUTH CAROLINA

SCHEDULE 8

DIRECT AND OVERLAPPING PROPERTY TAX RATES

LAST TEN FISCAL YEARS

(rate per thousand of assessed value)

		Town Direct Rates			Overlapping Rates									
Fiscal Year	Tax Year	General Fund	Debt Service	Total Direct Rate	County Operations	County Debt	County Land Purchase	County Schools Operations	County Schools Debt	Bluffton Fire District Operations	Bluffton Fire District Debt	Total Overlapping Rate	Total Rate	
**	2015	2014	40.00	4.35	44.35	46.48	5.48	4.90	103.50	31.71	24.02	-	216.09	260.44
	2016	2015	40.00	4.35	44.35	48.77	5.48	4.90	103.50	31.71	24.02	1.22	219.60	263.95
	2017	2016	39.00	3.35	42.35	50.89	5.48	4.90	111.50	31.71	24.64	1.10	230.22	272.57
	2018	2017	37.00	3.35	40.35	53.01	5.58	4.80	113.50	31.71	24.70	1.04	234.34	274.69
*	2019	2018	35.30	3.20	38.50	54.30	5.50	5.50	114.00	31.70	24.10	1.60	236.70	275.20
	2020	2019	35.30	3.20	38.50	54.30	5.50	5.50	114.00	31.70	24.10	1.60	236.70	275.20
	2021	2020	36.80	1.70	38.50	53.90	5.50	4.80	114.00	36.30	24.10	1.60	240.20	278.70
	2022	2021	36.80	1.70	38.50	53.90	5.60	5.30	121.60	36.30	24.10	1.60	248.40	286.90
	2023	2022	34.30	1.70	36.00	51.70	3.40	4.40	121.80	36.30	24.50	1.50	243.60	279.60
	2024	2023	34.30	1.70	36.00	51.70	3.40	4.40	121.80	36.30	24.10	1.90	243.60	279.60

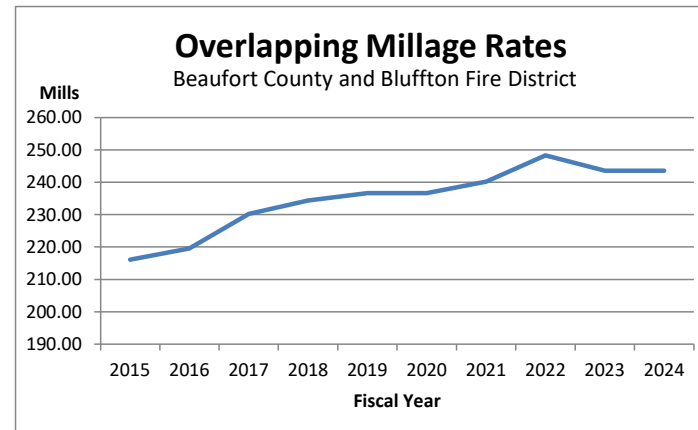
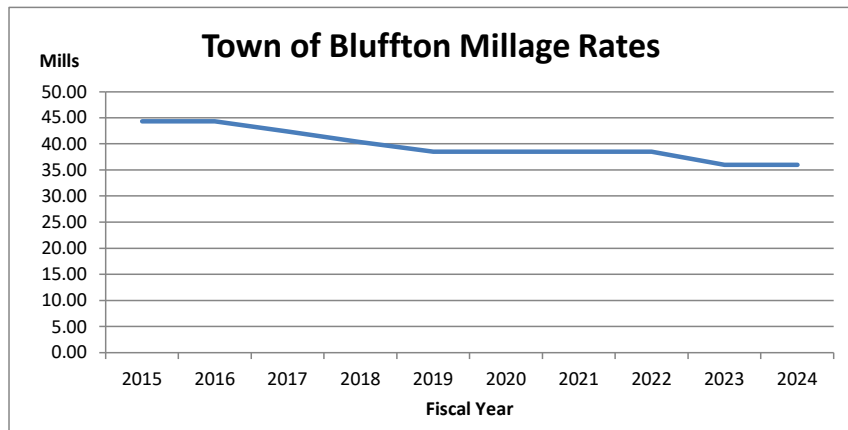
Source: Beaufort County Auditor's Office and Town Finance Department

\* Represents Reassessment and millage rollback

\*\* Represents Reassessment and millage rollforward

Notes: The Town's basic property tax rate may be increased only by a majority vote of Town Council after sufficient public notice has been provided to the citizens. State legislature limits the millage rate increase for general operating purposes to the region's average CPI for the January through December period of the prior year plus estimated population growth.

Overlapping rates are those of local and county governments that apply to property owners within the Town of Bluffton in addition to those impacted directly by the Town itself. Not all overlapping rates apply to all of the Beaufort County School District property owners. Beginning with Tax Year 2006, a 1% statewide sales tax was used to pay the operating expenses that would otherwise have been paid by owner occupied residents as a part of their millage rate. Prior to Tax Year 2006, the owner occupied and non-owner occupied rates were the same. Whereas currently, the Beaufort County School District rates apply only to non-owner occupied properties.



## TOWN OF BLUFFTON, SOUTH CAROLINA

### SCHEDULE 9 PRINCIPAL PROPERTY TAXPAYERS CURRENT YEAR AND NINE YEARS AGO

Taxpayer	Fiscal Year 2024 Tax Year 2023			Fiscal Year 2015 Tax Year 2014		
	Total Assessed Value	Rank <sup>1</sup>	Percentage of Total Town Taxable Assessed Value	Total Assessed Value	Rank <sup>1</sup>	Percentage of Total Town Taxable Assessed Value
Dominion Energy South	\$ 7,009,910	1	1.64%	\$ 4,360,910	1	3.10%
Passco One Hampton DST	4,161,040	2	0.97%	-		-
Bluffton Telephone Company	3,863,980	3	0.90%	1,026,560	6	0.73%
Crowne at 170 LP	3,193,090	4	0.75%	826,350	8	0.59%
Neyland Apartment Associates	2,884,300	5	0.68%	-		-
PBLH LLC	2,806,740	6	0.66%	1,138,900	5	0.81%
May River Forest LLC	2,054,300	7	0.48%	884,240	7	0.63%
Palmetto Electric Cooperative	1,985,660	8	0.46%	1,712,190	3	1.22%
BC Buckwalter LLC	1,666,610	9	0.39%	-		-
Q New River Forest Holdings LLC	1,247,640	10	0.29%	-		-
East Coast Newspaper Inc.	-		-	1,912,750	2	0.93%
Garrison Bluffton LLC	-		-	1,306,610	4	1.36%
BRE Mariner Belfair Town Village LLC	-		-	768,330	9	0.55%
Bluffton Land Investors	-		-	628,310	10	0.45%
<b>Total</b>	<b>\$ 30,873,270</b>		<b>7.22%</b>	<b>\$ 14,565,150</b>		<b>10.37%</b>

Source: Beaufort County Assessor's Office

<sup>1</sup>Note: The rankings are based on total taxes paid and not the total assessed value.

## TOWN OF BLUFFTON, SOUTH CAROLINA

### SCHEDULE 10 PROPERTY TAX LEVIES AND COLLECTIONS LAST TEN FISCAL YEARS

Fiscal Year Ended June 30,	Tax Year	Taxes Levied for the Fiscal Year	Collected within the Fiscal Year of the Levy		Collections In Subsequent Years	Total Collections to Date	
			Amount	Percentage of Levy		Amount	Percentage of Levy
2015	2014	\$ 5,989,057	\$ 5,978,582	99.83%	\$ 32,515	\$ 5,978,582	99.83%
2016	2015	6,876,467	6,550,702	95.26%	n/a	6,550,702	95.26%
2017	2016	7,141,565	7,025,202	98.37%	n/a	7,025,202	98.37%
2018	2017	7,587,957	7,522,431	99.14%	n/a	7,522,431	99.14%
2019	2018	8,597,686	8,566,314	99.64%	n/a	8,566,314	99.64%
2020	2019	9,652,689	9,397,631	97.36%	n/a	9,397,631	97.36%
2021	2020	10,623,522	10,172,420	95.75%	n/a	10,172,420	95.75%
2022	2021	11,746,994	11,414,985	97.17%	n/a	11,414,985	97.17%
2023	2022	13,291,923	13,142,332	98.87%	n/a	13,142,332	98.87%
<b>2024</b>	<b>2023</b>	<b>14,956,605</b>	<b>14,611,621</b>	<b>97.69%</b>	<b>n/a</b>	<b>14,611,621</b>	<b>97.69%</b>

**Source:** Beaufort County Treasurer's Office and Finance Department.

**Note:** Penalties associated with delinquent collections are not included in this schedule. For some fiscal years, information for collections in subsequent years is not always available at the time of printing. Therefore, delinquent collections may be shown in the year collected and may result in collection percentages slightly (immaterial) higher.

\*COVID-19

n/a - not available at time of printing

TOWN OF BLUFFTON, SOUTH CAROLINA

SCHEDULE 11  
 DIRECT AND OVERLAPPING SALES TAX RATES  
 LAST TEN FISCAL YEARS

Fiscal Year	Town Direct Rate	Beaufort County	South Carolina
2015	0%	0%	6%
2016	0%	0%	6%
2017	0%	0%	6%
2018	0%	0%	6%
2019	0%	1%	6%
2020	0%	1%	6%
2021	0%	1%	6%
2022	0%	0%	6%
2023	0%	1%	6%
2024	0%	1%	6%

Sources: Beaufort County and Town Finance Department

## TOWN OF BLUFFTON, SOUTH CAROLINA

### SCHEDULE 12 RATIOS OF OUTSTANDING DEBT BY TYPE LAST TEN FISCAL YEARS

Fiscal Year	General Obligation Bonds	Revenue Bonds	Financed Purchases	Leases	Subscription Based IT Arrangements	Intergovernmental Agreement Payments	Operating Payable	Total	Percentage of Personal Income <sup>a</sup>	Per Capita <sup>a</sup>
2015	\$ 6,090,000	\$ 8,923,000	\$ 919,944	\$ -	\$ -	\$ 200,000	\$ 219,146	\$ 16,352,090	0.00%	\$ 1,076
2016	5,875,000	8,212,365	1,167,525	-	-	38,000	-	15,292,890	0.00%	914
2017	5,650,000	7,483,156	1,125,974	-	-	-	-	14,259,130	0.00%	755
2018	5,415,000	6,734,888	771,296	-	-	-	-	12,921,184	0.00%	642
2019	5,175,000	5,967,060	749,579	-	-	-	-	11,891,639	0.00%	515
2020	4,930,000	5,179,165	840,119	-	-	-	-	10,949,284	0.00%	428
2021	9,616,518	4,370,677	534,005	-	-	-	-	14,521,200	0.00%	524
2022	9,095,958	3,541,057	366,499	650,677 *	-	-	-	13,654,191	0.00%	424
2023	8,564,676	12,063,571	319,093	626,269	75,691 **	-	-	21,649,300	0.00%	628
<b>2024</b>	<b>8,023,180</b>	<b>10,873,418</b>	<b>-</b>	<b>1,806,621</b>	<b>38,451</b>	<b>-</b>	<b>-</b>	<b>20,741,670</b>	<b>0.00%</b>	<b>589</b>

**Note:** Details regarding the Town's outstanding debt can be found in the notes to the financial statements.

<sup>a</sup>See Schedule 17 for personal income and population data. These ratios are calculated using personal income for the prior calendar year.

\* Implementation of GASB 87

\*\* Implementation of GASB 96

n/a - not available at time of printing.



**TOWN OF BLUFFTON, SOUTH CAROLINA**

**SCHEDULE 13**

**RATIOS OF NET GENERAL BONDED DEBT OUTSTANDING**

**LAST TEN FISCAL YEARS**

<b>Fiscal Year</b>	<b>General Obligation Bonds</b>	<b>Total Gross</b>	<b>Exempt from Debt Limit</b>	<b>Total Net</b>	<b>Percentage of Actual Taxable Value<sup>a</sup> of Property</b>	<b>Per Capita<sup>b</sup></b>
2014	\$ 6,300,000	\$ 6,300,000	\$ -	\$ 6,300,000	0.24%	\$ 463
2015	6,090,000	6,090,000	-	6,090,000	0.23%	401
2016	5,875,000	5,875,000	-	5,875,000	0.21%	351
2017	5,650,000	5,650,000	-	5,650,000	0.20%	299
2018	5,415,000	5,415,000	-	5,415,000	0.17%	269
2019	5,175,000	5,175,000	-	5,175,000	0.14%	224
2020	4,930,000	4,930,000	-	4,930,000	0.11%	193
2021	9,616,518	9,616,518	-	9,616,518	0.19%	347
2022	9,095,958	9,095,958	-	9,095,958	0.14%	283
2023	8,564,676	8,564,676	-	8,564,676	0.13%	248
<b>2024</b>	<b>8,023,180</b>	<b>8,023,180</b>	<b>-</b>	<b>8,023,180</b>	<b>0.10%</b>	<b>228</b>

**Note:** Details regarding the Town's outstanding debt can be found in the notes to the financial statements.

<sup>a</sup>See Schedule 7 for property value data.

<sup>b</sup>See Schedule 17 for personal income and population data.

# TOWN OF BLUFFTON, SOUTH CAROLINA

**SCHEDULE 14**

**DIRECT AND OVERLAPPING GOVERNMENTAL ACTIVITIES DEBT  
AS OF JUNE 30, 2024**

Government Unit	Debt Outstanding	Estimated Percentage Applicable	Estimated Share of Direct and Overlapping Debt
<b>Debt repaid with property taxes</b>			
Beaufort County School District	\$ 387,709,512	17.5%	\$ 67,849,165
Beaufort County General Obligation Debt	143,905,002	17.5%	25,183,375
Bluffton Fire District	14,721,648	55.5%	8,170,515
Subtotal, overlapping debt			101,203,055
<b>Town direct debt</b>			20,741,670
<b>Total direct and overlapping debt</b>			\$ 121,944,725

**Sources:** Beaufort County's Town Finance Department and the Beaufort County Assessor's Office.

**Note:** Overlapping governments are those that coincide, at least in part, with the geographic boundaries of the Town. This schedule estimates the portion of the outstanding debt of those overlapping governments that is borne by the residents and businesses of the Town of Bluffton. This process recognizes that, when considering the Town's ability to issue and repay long-term debt, the entire debt burden borne by the residents and businesses should be taken into account. However, this does not imply that every taxpayer is a resident—and, therefore, responsible for repaying the debt—of each overlapping government. The assessed values used to estimate applicable percentages are as provided by the Beaufort County Assessor's Office.

## TOWN OF BLUFFTON, SOUTH CAROLINA

### SCHEDULE 15 LEGAL DEBT MARGIN INFORMATION LAST TEN FISCAL YEARS

Assessed value	\$ 427,225,202
Debt Limit (8% of assessed value)	34,178,016
Debt applicable to limit	(7,125,000)
Legal Debt Margin (without a Referendum)	<u>\$ 27,053,016</u>

	Fiscal Year									
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Debt limit	\$ 11,719,564	\$ 12,404,000	\$ 13,507,717	\$ 16,129,838	\$ 19,154,095	\$ 19,025,454	\$ 21,627,332	\$ 23,830,041	\$ 27,805,467	\$ 34,178,016
Total net debt applicable to limit	6,090,000	5,875,000	5,650,000	5,415,000	5,175,000	4,930,000	8,265,000	7,905,000	7,525,000	7,125,000
Legal debt margin	5,629,564	6,529,000	7,857,717	10,714,838	13,979,095	14,095,454	13,362,332	15,925,041	20,280,467	27,053,016
Total net debt applicable to the limit as a percentage of debt limit	51.96%	47.36%	41.83%	33.57%	27.02%	25.91%	38.22%	33.17%	27.06%	20.85%

**Note:** Article Ten (X), Section Fourteen (14), of the South Carolina Constitution of 1895 as amended provides that a City or Town shall incur General Obligation Debt over the 8% limit only when approved by a majority vote of the qualified electors of the political subdivisions voting in a referendum authorized by law. There shall be no conditions or restrictions limiting the incurring of such indebtedness except:

- a. Those restrictions and limitations imposed in the authorization to incur such indebtedness;
- b. The provisions of Article Ten (X), Section Fourteen (14); and
- c. Such general obligation debt shall be issued within five (5) years of the date of such referendum and shall mature within forty (40) years from the time such indebtedness shall be incurred.

## TOWN OF BLUFFTON, SOUTH CAROLINA

### SCHEDULE 16 PLEDGED REVENUE COVERAGE LAST TEN FISCAL YEARS

Fiscal Year	Tax Increment Bonds					Coverage
	Revenue	Debt Service			Total	
		Principal	Interest			
2015	\$ 1,294,921	\$ 690,000	\$ 274,323	\$ 964,323	1.34	
2016	1,568,346	710,635	221,046	931,681	1.68	
2017	1,564,116	729,209	202,472	931,681	1.68	
2018	1,778,438	748,268	183,413	931,681	1.91	
2019	2,172,578	767,826	163,855	931,681	2.33	
2020	2,471,033	787,895	143,786	931,681	2.65	
2021	2,745,263	808,488	123,193	931,681	2.95	
2022	3,103,571	829,620	102,061	931,681	3.33	
2023	3,550,357	1,277,486	295,129	1,572,615	2.26	
2024	4,187,959	1,190,153	382,461	1,572,614	2.66	

**Note:** Revenue includes property taxes and Municipal Improvement District ("MID") fees, Municipal Improvement Development Fees ("MIDF"), and Development Agreement Fees.

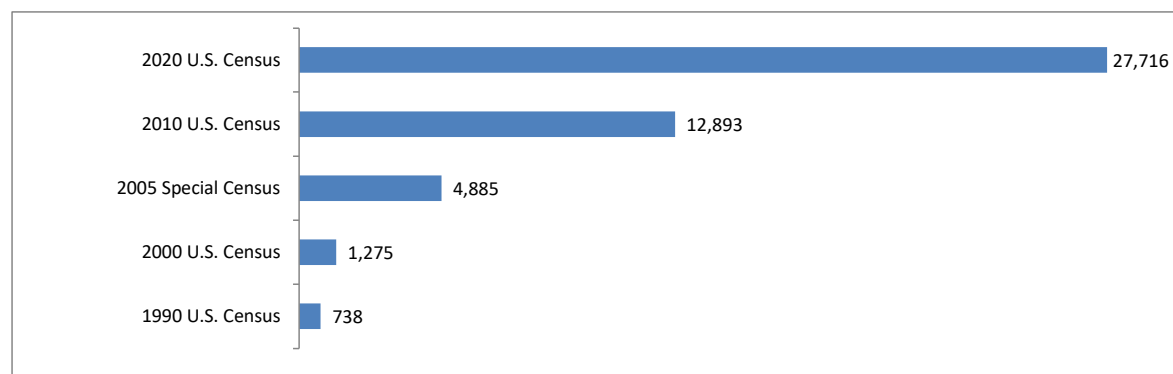
## TOWN OF BLUFFTON, SOUTH CAROLINA

### SCHEDULE 17 DEMOGRAPHIC AND ECONOMIC STATISTICS LAST TEN CALENDAR YEARS

Calendar Year	Population	Personal Income	Per Capita Personal Income	Town of Bluffton School Enrollment	Beaufort County School Enrollment	Annual Unemployment Rate*
2013	13,606	\$ 354,218,604	\$ 26,034	5,912	20,285	6.4%
2014	15,199	391,009,474	25,726	6,262	20,622	5.7%
2015	16,728	469,906,248	28,091	6,642	21,120	5.5%
2016	18,897	584,465,313	30,929	7,149	21,439	4.6%
2017	20,126	662,608,298	32,923	8,208	21,952	3.3%
2018	23,097	859,300,788	37,204	8,000	22,014	3.9%
2019	25,557	991,049,346	38,778	8,000	22,345	3.0%
2020	27,716	1,212,824,444	43,759	8,762	21,229	7.4%
2021	32,191	1,517,161,830	47,130	8,526	21,120	2.9%
2022	34,493	1,806,777,833	52,381	8,873	21,199	3.2%
2023	35,243	1,977,942,889	56,123	8,888	21,337	4.6%

\* Town of Bluffton data not available due to low population; Beaufort County data provided alternatively  
n/a - not available at time of printing.

**Sources:** Population for remaining years are estimates only as provided by the Census Bureau's Population Division; Personal Income provided by U.S. Census Bureau, American Fact Finder; Unemployment rate provided by U.S. Department of Labor, Bureau of Labor and Statistics. BCSD School Enrollment taken from BCSD ACFR.



## TOWN OF BLUFFTON, SOUTH CAROLINA

### SCHEDULE 18 PRINCIPAL EMPLOYERS CURRENT YEAR AND NINE YEARS AGO

Employer	2024			2015		
	# of Employees	Rank	% of Total Town Employment	# of Employees	Rank	% of Total Town Employment
Beaufort County School District - Bluffton only	1,080	1	n/a	556	1	n/a
EviCore National, LLC/CareCore National, LLC	600	2	n/a	354	2	n/a
Montage Palmetto Bluff	581	3	n/a	347	3	n/a
Publix	545	4	n/a	234	4	n/a
Palmetto Bluff	470	5	n/a			
Kroger	381	6	n/a	125	9	n/a
Right At Home	246	7	n/a			
Hargray	200	8	n/a	150	7	n/a
NHC Healthcare/The Palmettos	194	9	n/a	207	5	n/a
Town of Bluffton	164	10	n/a	107	10	n/a
Bluffton Township Fire Department	-		n/a	129	8	n/a
Resort Services Inc.	-		n/a	180	6	n/a

**Source:** Town's Finance Department

n/a - not available at time of printing.

## TOWN OF BLUFFTON, SOUTH CAROLINA

### SCHEDULE 19 FULL-TIME EQUIVALENT TOWN GOVERNMENT EMPLOYEES BY FUNCTION/PROGRAM LAST TEN FISCAL YEARS

Function/Program	Fiscal Year									
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
General government:										
Information technology	4.0	4.0	4.5	5.5	5.5	6.0	6.0	7.0	7.5	7.5
Municipal court	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	2.0	3.0
Executive	4.0	5.5	6.5	7.5	5.5	5.0	5.0	6.0	6.5	6.5
Economic development	2.0	1.0	3.0	3.0	3.0	2.0	3.0	3.0	3.0	3.0
Human resources	2.0	2.0	2.0	2.0	3.0	3.0	3.0	3.0	3.0	3.0
Finance	7.0	8.5	9.5	11.0	8.5	9.0	9.0	10.0	9.5	9.5
Growth management administration	4.0	4.0	7.0	7.0	4.0	4.0	3.0	3.0	3.0	3.5
Planning and community development	3.0	3.0	5.0	5.0	9.0	9.0	8.0	11.0	11.5	11.0
Environmental Protection:										
Stormwater management	6.0	6.0	6.0	6.0	6.0	7.0	7.0	8.0	8.0	8.0
Engineering:										
Project management	5.0	6.5	7.5	8.0	9.0	6.0	8.0	7.0	7.0	7.0
Public works:										
Public works	11.0	9.0	9.0	10.0	9.0	12.0	13.0	14.0	13.0	13.0
Public safety:										
Police	49.0	58.0	60.0	59.0	57.0	61.0	67.0	67.0	75.0	75.0
Building safety	12.0	13.0	7.0	7.0	7.0	7.0	7.0	7.0	8.0	8.0
Total	<u>112.0</u>	<u>123.5</u>	<u>130.0</u>	<u>134.0</u>	<u>129.5</u>	<u>134.0</u>	<u>142.0</u>	<u>149.0</u>	<u>157.0</u>	<u>158.0</u>

**Source:** Town Finance Department

**Note:** Data represents the number of employees ending June 30 each year. A full-time equivalent is a measurement equal to one employee working a full-time schedule for one year and does not include the Mayor and Council.

## TOWN OF BLUFFTON, SOUTH CAROLINA

### SCHEDULE 20 OPERATING INDICATORS BY FUNCTION/PROGRAM LAST TEN FISCAL YEARS

Function/Program	Fiscal Year									
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
General Government:										
Business licenses issued	2,476	2,297	2,793	3,317	3,679	2,771	3,199	4,197	4,481	3,856
Hospitality Tax remitters	133	113	135	145	146	186	197	193	224	218
Accommodations Tax remitters	23	33	28	49	59	85	126	146	189	194
Court case counts	7,009	6,301	7,324	8,392	6,139	6,551	5,282	3,409	2,096	2,288
Jury trial counts	11	14	64	61	202	-	-	145	87	40
Planning and community development applications issued	362	340	299	346	236	181	175	174	137	141
Environmental Protection/Stormwater Management:										
Certificates of compliance	n/a	57	120	59	53	41	51	29	32	55
Notices to comply	n/a	300	363	383	254	300	300	251	295	112
Stop work orders	-	-	8	11	5	18	38	30	26	6
Citations	-	1	13	3	3	7	7	3	6	9
Outreach/Education (# of people)	5,000	5,500	5,500	5,000	9,932	7,187	7,528	8,164	7,288	14,544
Sediment and erosion control Inspections	2,159	1,331	1,849	1,840	1,688	1,632	1,950	3,028	2,673	1,533
Post BMP inspections	-	-	-	-	-	-	-	-	53	64
Public Safety:										
Police calls for service	41,061	45,000	46,350	53,000	50,317	84,709	76,879	52,720	63,046	38,356
Domestic calls	515	475	489	470	631	631	552	602	487	605
Traffic collisions	871	1,080	1,112	1,200	1,239	1,137	1,320	1,492	1,526	1,598
Citations	8,628	6,200	6,368	9,400	7,138	7,680	6,670	4,572	5,675	5,188
Arrests	1,069	735	757	825	502	391	357	248	285	334
Reports	3,216	3,200	3,296	3,502	2,812	2,429	2,253	2,527	2,723	3,196
Building permit counts	1,532	1,723	1,846	1,816	1,606	1,731	1,588	1,264	1,082	1,047
Development permits Issued	27	43	52	69	40	22	25	34	29	28
Construction site inspections	24,398	19,002	16,009	16,145	14,453	16,232	19,931	19,297	19,463	17,109
Public Projects and Facilities:										
Number of capital improvement projects to manage	16	21	25	29	33	37	39	42	43	37
Number of parks to maintain	7	7	8	8	13	13	12	12	13	14
Number of pathways to maintain	19	23	23	23	23	23	22	22	22	22

**Source:** Town departments

n/a - not available at time of printing



**TOWN OF BLUFFTON, SOUTH CAROLINA**

**SCHEDULE 21**

**CAPITAL ASSET STATISTICS BY FUNCTION/PROGRAM**

**LAST TEN FISCAL YEARS**

Function/Program	Fiscal Year									
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
General Government:										
Town-owned parcels	30	30	32	34	36	36	39	39	42	<b>43</b>
Town-owned property acreage	577	574	577	578	624	624	625	625	626	<b>642</b>
Town vehicles	4	4	7	7	7	8	8	8	8	<b>8</b>
Environmental Protection/Stormwater Management:										
Town vehicles	3	3	3	3	3	3	4	3	4	<b>3</b>
Engineering:										
Town vehicles	2	2	4	4	2	2	2	1	1	<b>1</b>
Public Works:										
Town vehicles	6	8	9	9	10	10	10	10	11	<b>11</b>
Utility vehicles	1	-	-	1			-	1	1	<b>1</b>
Dump truck	1	-	1	1	1	1	1	1	1	<b>1</b>
Tractor	1	2	2	2	3	5	5	2	2	<b>2</b>
Public Safety:										
Law enforcement center	1	1	1	1	1	1	1	1	1	<b>3</b>
Police vehicles	50	61	61	62	68	73	77	62	64	<b>57</b>
Police mobility vehicles	3	3	3	2	2	3	6	5	5	<b>5</b>
Police boat - marine patrol	1	1	1	1	1	1	1	1	1	<b>1</b>
Town vehicles (building safety)	7	7	6	6	7	9	9	9	9	<b>9</b>
Public Projects and Facilities:										
Streets (miles)	3.81	3.03	3.06	3.06	3.06	3.06	3.06	3.06	3.06	<b>3.06</b>
Pathways (miles)	11.86	11.86	11.95	14.27	14.64	14.64	14.64	14.64	14.64	<b>14.64</b>
Parks (count)	7	7	8	8	10	10	11	11	11	<b>11</b>

**Source:** Finance Department and Public Works Department

## COMPLIANCE SECTION

**INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER  
FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS  
BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE  
WITH GOVERNMENT AUDITING STANDARDS**

---

**The Honorable Mayor and Members  
of the Town Council  
Town of Bluffton, South Carolina  
Bluffton, South Carolina**

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the governmental activities, each major fund, the discretely presented component unit, and the aggregate remaining fund information of the Town of Bluffton, South Carolina (the "Town") as of and for the year ended June 30, 2024, and the related notes to the financial statements, which collectively comprise the Town's basic financial statements and have issued our report thereon dated December 18, 2024.

**Report on Internal Control Over Financial Reporting**

In planning and performing our audit of the financial statements, we considered the Town's internal control over financial reporting ("internal control") as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Town's internal control. Accordingly, we do not express an opinion on the effectiveness of the Town's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit, we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses or significant deficiencies may exist that were not identified.

---

**Report on Compliance and Other Matters**

As part of obtaining reasonable assurance about whether the Town's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit and, accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

**Purpose of this Report**

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Town's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Town of Bluffton, South Carolina's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

*Mauldin & Jenkins, LLC*

Savannah, Georgia  
December 18, 2024

## **INDEPENDENT AUDITOR'S REPORT ON COMPLIANCE FOR EACH MAJOR FEDERAL PROGRAM AND ON INTERNAL CONTROL OVER COMPLIANCE REQUIRED BY THE UNIFORM GUIDANCE**

---

**The Honorable Mayor and Members  
of the Town Council  
Town of Bluffton, South Carolina  
Bluffton, South Carolina**

### **Report on Compliance for Each Major Federal Program**

#### ***Opinion on Each Major Federal Program***

We have audited the Town of Bluffton, South Carolina's (the "Town") compliance with the types of compliance requirements identified as subject to audit in the OMB *Compliance Supplement* that could have a direct and material effect on the Town's major federal program for the year ended June 30, 2024. The Town's major federal program is identified in the Summary of Auditor's Results section of the accompanying Schedule of Findings and Questioned Costs.

In our opinion, the Town complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2024.

#### ***Basis for Opinion on Each Major Federal Program***

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* ("Uniform Guidance"). Our responsibilities under those standards and the Uniform Guidance are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of the Town and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion on compliance for each major federal program. Our audit does not provide a legal determination of the Town's compliance with the compliance requirements referred to above.

#### ***Responsibilities of Management for Compliance***

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules, and provisions of contracts or grant agreements applicable to the Town's federal program.

---

***Auditor's Responsibilities for the Audit of Compliance***

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on the Town's compliance based on our audit. 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, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about the Town's compliance with the requirements of each major federal program as a whole.

In performing an audit in accordance with generally accepted auditing standards, *Government Auditing Standards*, and the Uniform Guidance, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, 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 Town's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of the Town's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of the Town's internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

---

**Report on Internal Control Over Compliance**

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit, we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

*Mauldin & Jenkins, LLC*

Savannah, Georgia  
December 18, 2024

# TOWN OF BLUFFTON, SOUTH CAROLINA

## SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS FOR THE FISCAL YEAR ENDED JUNE 30, 2024

<b>Federal Grantor/Pass-through Grantor/Program Title</b>	<b>Federal AL Number</b>	<b>Grant Identification Number</b>	<b>Expenditures</b>	<b>Passed Through to Subrecipients</b>
<b>U.S. Department of the Interior</b>				
Passed through the South Carolina Department of Parks Recreation, and Tourism Land and Water Conservation Fund	15.916	45-01131	\$ 450,000	\$ -
<b>Total U.S. Department of the Interior</b>			450,000	-
<b>U.S. Department of Justice</b>				
Direct Awards:				
Bulletproof Vest Partnership Program	16.607	NA	1,637	-
Passed through the South Carolina Department of Public Safety Justice Assistance Grant	16.738	5G003322	56,061	-
<b>Total U.S. Department of Justice</b>			57,698	-
<b>Environmental Protection Agency</b>				
Passed through the South Carolina Department of Health and Environmental Control				
Section 319(h) Nonpoint Source Implementation Grant	66.460	EQ-0-263	188,621	-
Section 319(h) Nonpoint Source Implementation Grant	66.460	EQ-1-599	57,217	-
<b>Total Environmental Protection Agency</b>			245,838	-
<b>U.S. Department of Treasury</b>				
Direct Awards:				
Coronavirus State and Local Fiscal Recovery Funds	21.027	NA	69,118	-
<b>Total U.S. Department of Treasury</b>			69,118	-
<b>Total Expenditures of Federal Awards</b>			\$ 822,654	\$ -



# TOWN OF BLUFFTON, SOUTH CAROLINA

## NOTES TO THE SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS FOR THE FISCAL YEAR ENDED JUNE 30, 2024

### NOTE 1. BASIS OF PRESENTATION

The accompanying Schedule of Expenditures of Federal Awards ("SEFA") includes the federal award activity of the Town under programs of the federal government for the year ended June 30, 2024. The information in this schedule is presented in accordance with the requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* ("Uniform Guidance"). Because the SEFA presents only a selected portion of the operations of the Town, it is not intended to and does not present the net position, changes in net position, or cash flows of the Town.

### NOTE 2. SIGNIFICANT ACCOUNTING POLICIES

Expenditures reported on the SEFA are reported on the accrual basis of accounting. Such expenditures are recognized following the cost principles contained in Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, wherein certain types of expenditures are not allowable or are limited as to reimbursement.

### NOTE 3. INDIRECT COST RATE

The Town has elected not to use the 10% de minimis indirect cost rate allowed under the Uniform Guidance.

### NOTE 4. NON-CASH ASSISTANCE

No federal awards were expended in the form of non-cash assistance during the fiscal year ended June 30, 2024.

# TOWN OF BLUFFTON, SOUTH CAROLINA

## SCHEDULE OF FINDINGS AND QUESTIONED COSTS FOR THE FISCAL YEAR ENDED JUNE 30, 2024

### SECTION I SUMMARY OF AUDIT RESULTS

#### **Financial Statements**

Type of report the auditor issued on whether the financial statements audited were prepared in accordance with GAAP.

Unmodified

Internal control over financial reporting:  
Material weaknesses identified?

\_\_\_ Yes X No

Significant deficiencies identified not considered  
to be material weaknesses?

\_\_\_ Yes X No

Noncompliance material to financial statements noted?

\_\_\_ Yes X No

#### **Federal Awards**

Internal control over financial reporting:  
Material weaknesses identified?

\_\_\_ Yes X No

Significant deficiencies identified not considered  
to be material weaknesses?

\_\_\_ Yes X None reported

Type of auditor's report issued

Unmodified

Any audit findings disclosed that are required to  
be reported in accordance with 2 CFR 200.516(a)?

\_\_\_ Yes X No

Identification of major programs:

AL Number  
15.916

Name of Federal Program or Cluster  
**U.S. Department of the Interior:**  
Land and Water Conservation Fund

Dollar threshold used to distinguish between  
Type A and Type B programs?

\$750,000

Auditee qualified as a low-risk auditee?

X Yes \_\_\_ No

### SECTION II FINANCIAL STATEMENT FINDINGS AND RESPONSES

None reported.

# TOWN OF BLUFFTON, SOUTH CAROLINA

## SCHEDULE OF FINDINGS AND QUESTIONED COSTS FOR THE FISCAL YEAR ENDED JUNE 30, 2024

---

### SECTION III FEDERAL AWARD FINDINGS AND QUESTIONED COSTS

None reported.

### SECTION IV PRIOR YEAR FINDINGS AND RESPONSES

None reported.

**Attachment 2**

**RESOLUTION**

A RESOLUTION RELATING TO THE TOWN OF BLUFFTON, SOUTH CAROLINA,  
ACCEPTING THE BASIC FINANCIAL STATEMENTS AND AUDIT  
FOR FISCAL YEAR 2023-2024 AS PRESENTED

**WHEREAS**, the Town of Bluffton authorized a contract to be executed on June 8, 2021 with Mauldin & Jenkins, LLC for annual audit services through fiscal year ending June 30, 2026; and

**WHEREAS**, the audit for fiscal year ended June 30, 2024 was presented to Town Council where an unmodified (clean) opinion was issued;

**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 accepts the basic financial statements and audit for fiscal year 2023-2024 as presented by Mauldin & Jenkins, LLC on December 10, 2024.

Approved this 14<sup>th</sup> day of January 2025.

---

Larry Toomer, Mayor

Town of Bluffton, South Carolina

ATTEST:

---

Marcia Hunter, Town Clerk

SEAL

# Council Motion Recommendation

Acceptance of the Town of Bluffton Fiscal Year 2024 Audit performed by Mauldin and Jenkins, LLC

**"I make a motion to accept the Fiscal Year 2024 Audit for the Town of Bluffton performed by Mauldin & Jenkins, LLC and its inclusion in the Annual Comprehensive Financial Report for the year ending June 30, 2024."**