



TOWN OF BLUFFTON
Special Tax Assessment for Rehabilitated
Historic Properties (Bailey Bill Program)
Preliminary Certification Application

Growth Management Customer Service Center
 20 Bridge Street
 Bluffton, SC 29910
 (843)706-4500
www.townofbluffton.sc.gov
applicationfeedback@townofbluffton.com
 Attn: Historic Preservationist

A Special Tax Assessment for Rehabilitated Historic Properties, known as the Bailey Bill Program, is available for eligible owners of Town-designated Contributing Structures in Old Town Bluffton Historic District who rehabilitate their Contributing Structure in accordance with program requirements.

A minimum expense percentage of 20% is required; the expense percentage is the qualified rehabilitation expenditures occurring after Preliminary Certification based on the fair market value of the Contributing Structure prior to rehabilitation. Upon Final Certification, eligible properties can receive a special assessment equal to the pre-rehabilitation value for a period of 5-20 years, depending on expenditures. The special tax assessment is available only for Town of Bluffton property taxes. For specific program details and to expedite your application, please read the attached information prior to submission of this application.

The Bailey Bill Program is administered pursuant to Chapter 24, Article V of the Town of Bluffton Municipal Code of Ordinances and SC Code of Laws §4-9-195 and §5-21-140, as amended.

| Property Information | | |
|----------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| Name of Contributing Structure: | | |
| Street Address: | | |
| Town: Bluffton | State: South Carolina | Zip Code: 29910 |
| Property Identification No. (PIN): | | |
| Property Owner(s) Information | | |
| Property Owner Name(s): | | |
| Street Address: | | |
| Town: | State: | Zip Code: |
| Phone: () | Email: | |
| Fair Market Value | | |
| Fair Market Value: \$ | | |
| How was fair market value determined? <i>Documentation required</i> | Check box that applies: <input type="checkbox"/> Property appraisal completed by a real estate appraiser licensed by the State of South Carolina; or <input type="checkbox"/> Sale price as delineated in a bona fide contract of sale within 12 months of the date the application is submitted; or <input type="checkbox"/> Most recent appraised value published by the Beaufort County Tax Assessor | |



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Structure History

Provide a brief overview of the history of your home, if known. This includes dates and nature of construction, additions, and alterations. If available, please provide photos, plans or other information. Copies are acceptable.

Project Proposal

| | |
|----------------------------------|-----------------------------------------|
| Project Start Date (month/year): | Estimated Completion Date (month/year): |
|----------------------------------|-----------------------------------------|

Total Estimated Project Cost:

How will property be used after completion?

| | |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| What improvements are proposed? | Check all boxes that applies: <input type="checkbox"/> Repairs to building exterior; <input type="checkbox"/> Alterations to building exterior; <input type="checkbox"/> New construction on property, including site work; <input type="checkbox"/> Alterations to interior primary public spaces of a public or commercial use, as defined by the reviewing authority; <input type="checkbox"/> Any remaining work where the expenditures for such work are being used to satisfy the minimum expenditures for rehabilitation, including but not limited to alterations made to mechanical, plumbing and electrical systems. |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Required Attachments

- Documentation of fair market value
- Completed application and required documentation describing the proposed rehabilitation
- Completed Certificate of Appropriateness - Historic District (COFA-HD) or Site Feature - Historic District application, as applicable.

Under penalty of perjury, I certify that all information included in this application is true and correct. I understand that the property shall not be eligible for a Special Tax Assessment for Rehabilitated Historic Properties until Final Certification has been granted by the Town of Bluffton pursuant to Chapter 24, Article V of the Town of Bluffton Municipal Code of Ordinances and SC Code of Laws §4-9-195 and §5-21-140, as amended. I understand that once Final Certification has been granted and the property has been deemed eligible for the Special Tax Assessment, I must submit the approved Final Certification letter provided by the Town of Bluffton to the Beaufort County Auditor in order to receive the special assessment.

 Property Owner Signature

 Date



TOWN OF BLUFFTON
SPECIAL TAX ASSESSMENT FOR REHABILITATED HISTORIC PROPERTIES
(BAILEY BILL PROGRAM) APPLICATION
PROCESS NARRATIVE

The following Process Narrative is intended to provide Applicants with an understanding of the respective application process, procedures and Town Code and Unified Development Ordinance (UDO) requirements, as applicable, for obtaining application approval in the Town of Bluffton. While intended to explain the process, it is not intended to repeal, eliminate or otherwise limit any requirements, regulations or provisions of the Town Code or the UDO. Compliance with these procedures will minimize delays and assure expeditious application review.

| | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------|
| Step 1. Pre-Application Meeting | Applicant & Staff |
| Prior to the filing of a Bailey Bill Program Precertification Application, the Applicant is required to consult with the UDO Administrator or their designee at a Pre-Application Meeting for comments and advice on the appropriate application process and the required procedures, specifications, and applicable standards required by the UDO and the Bailey Bill Program (Town of Bluffton Municipal Code of Ordinances, Chapter 24, Article V). | |
| Step 2. Application Check-In Meeting | Applicant & Staff |
| Upon receiving input from Staff at the Pre-Application Meeting, the Applicant shall submit the Bailey Bill Program Precertification Application together with the Certificate of Appropriateness-Historic District (COFA-HD) Application or Site Feature-Historic District (HD) Permit Application, as applicable, and any required submittal materials during a mandatory Application Check-In Meeting where the UDO Administrator or designee will review the submission for completeness. | |
| Step 3. Review by UDO Administrator & Historic Preservation Review Committee | Staff |
| If the UDO Administrator determines that the Applications are complete, the Bailey Bill Program Precertification Application and the COFA-HD Application or Site Feature-HD Permit Application, as applicable, shall be forwarded to the Historic Preservation Commission (HPC). | |
| Step 4. Historic Preservation Commission Meeting | Applicant, Staff & Historic Preservation Commission |
| The HPC will review the COFA-HD Application or Site Feature-HD Permit Application for compliance with the criteria and provisions in the UDO. The HPC may approve, approve with conditions, or deny the application. After a decision on the application, the HPC shall review the Bailey Bill Program Precertification Application to affirm precertification compliance. | |
| Step 5. Issues Certificate of Appropriateness | Staff |
| If the HPC approves the COFA-HD Application or the SF-HD Permit Application, the UDO Administrator shall issue the Certificate of Appropriateness-HD or Site Feature-HD Permit, as applicable. | |
| Step 6. Certificate of Completion or Certificate of Occupancy / Final Certification | Applicant & Staff |
| Once a Certificate of Completion or Certificate of Occupancy, as applicable, is issued by the Town, the Applicant shall request a Final Certification from the UDO Administrator. The UDO Administrator shall determine compliance with the requirements Town of Bluffton Municipal Code of Ordinances, Chapter 24, Article V). If there is compliance and the minimum expense percentage has been met, the UDO Administrator will prepare a letter for the Beaufort County Assessor identifying the assessment term. | |
| Step 7. Contact Beaufort County Assessor | Applicant |
| Upon receipt of Final Certification, it will be the responsibility of the Applicant to contact the Beaufort County Assessor to secure the special assessment. | |



TOWN OF BLUFFTON HISTORIC PRESERVATION INCENTIVE PROGRAM Special Tax Assessment for Rehabilitated Historic Properties (Bailey Bill Program)

Overview: A Special Tax Assessment for Rehabilitated Historic Properties, known as the Bailey Bill Program, is available for eligible owners of Town-designated Contributing Structures in Old Town Bluffton Historic District who rehabilitate their Contributing Structure in accordance with program requirements.

The special assessment permits a property owner to lock-in the taxable assessed value of a Contributing Structure based on its fair market value established at Preliminary Certification and prior to rehabilitation. Town property tax is not paid on the increased value of the building until the special assessment period ends, which could be up to 20 years depending on the extent of the rehabilitation and expenditures. Final Certification is required.

The Bailey Bill Program is administered pursuant to [Chapter 24, Article V of the Town of Bluffton Municipal Code of Ordinances](#) and SC Code of Laws [§4-9-195](#), as amended.

What is a Contributing Structure?: As defined by the Town’s Unified Development Ordinance (UDO):

“Any structure located in Old Town Bluffton Historic District which helps to establish and maintain the character of Old Town. A Contributing Structure may not be unique itself, but as part of a collection of Historic Resources, it adds to the sense, time, place and historic development of the Old Town Bluffton Historic District, and possesses historical integrity through location, design, setting, materials, workmanship, feeling and association. Contributing Structures are all extant structures included in the *2008 Town of Bluffton Survey of Historic Properties* and any structures subsequently designated by Town Council.

All Contributing Structures are identified on the Contributing Resources Map available on the Town’s website (see [Map Gallery](#)). Additional structures *may* be designated by Town Council. For more information, please contact the Town’s Historic Preservationist.

What is Preliminary Certification?: To be considered for the special assessment and to confirm that a historic property complies with the requirements of the Bailey Bill program, a completed application for Preliminary Certification must be submitted. The application includes documentation of fair market value, historic designation, and a thorough description of the rehabilitation planned. The review process follows the process for a Certificate of Appropriateness – Historic District (COFA-HD), including an initial pre-application meeting.

Once the COFA-HD and Preliminary Certification are approved, work must be completed within two (2) years. Upon completion of the project, the owner submits a Final Certification form and invoices to document qualified expenditures. The work will be inspected, and documentation of qualified expenditures reviewed; if approved, Final Certification will be provided to the property owner for submission to the Beaufort County Auditor. The Final Certification will identify the term of the special assessment.



TOWN OF BLUFFTON HISTORIC PRESERVATION INCENTIVE PROGRAM Special Tax Assessment for Rehabilitated Historic Properties (Bailey Bill Program)

Eligible Properties: A property must be a Town-designated Contributing Structure and comply with one or more of the eligibility criteria of [Sec. 24-113](#). Removal of a Contributing Structure designation or demolition of a Contributing Structure will cause the special assessment to end. Unapproved changes may also cause the assessment to end. Work undertaken without required certification is not eligible.

Rehabilitation Work to be Evaluated: The following work must be reviewed by the Town and will require a Certificate of Appropriateness – Historic District (COFA-HD) application:

- Repairs to the exterior of a Contributing Structure;
- Alterations to the exterior of the Contributing Structure;
- New construction on the property on which the Contributing Structure is located, to include site work;
- For public and commercial structures, interior alterations for primary public spaces; and,
- Any remaining work where the expenditures for such work are being used to satisfy the minimum expenditures for rehabilitation, including, but not limited to, alterations made to mechanical, plumbing and electrical systems.

Minimum Expense Percentage Required: A minimum expense percentage of 20% is required. The expense percentage is the qualified rehabilitation expenditures occurring after Preliminary Certification by the fair market value of the historic property as provided in the approved Preliminary Certification. Upon Final Certification, eligible, approved properties receive a special assessment for a term of 5, 10, 15 or 20 years, depending on the expense percentage.

Qualified expenditures include: 1) improvements located on or within the Contributing Structure; 2) improvements outside of and directly attached to the Contributing Structure that are necessary to make the structure fully usable (but that are not rentable/habitable floor space attributable to new construction); 3) architectural and engineering services attributable to the design of the qualified improvements; and, 4) costs necessary to maintain the historic character or integrity of the Contributing Structures. Architectural and engineering costs are capped at 20% of the total qualified rehabilitation costs.

How Do I Start the Process?: A pre-application meeting is required to discuss your rehabilitation plans, as well as the steps to obtain approval. A [Pre-Application Meeting Request](#) form is required.

Related Information and Application Links:

- [Bailey Bill / Special Assessment Ordinance \(Chapter 24, Article V\)](#)
- [Pre-Application Meeting Request](#)
- [Certificate of Appropriateness-HD Application](#)

Town Contact: Glen Umberger, Historic Preservationist
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Email: gumberger@townofbluffton.com