2015-2016 APPLICATION FOR RESORT TAX FUNDS

As required by law, an applicant must be a legal entity formed under the laws of the State of Montana. The applicant must be "an entity" that is capable of both "legally and practically" carrying out the purpose of the appropriation and located within the resort area district. The applicant must be a governmental unit, corporation or limited partnership with the capability of being legally bound by the Appropriation Agreement.

The purpose of the appropriation request must be within the purposes of the District's Legal Ordinance NO. 98-01 (posted online: www.ResortTax.org), as amended, and must benefit the community at large, and not a single person, organization or corporation.

INSTRUCTIONS:

- For new requests and rollover requests, use the forms provided. Do not use your own format; do not change the applications.
- The application must be signed by the governing Board Chair or Officer of the applicant organization. If funded, the governing Board Chair or Officer must also sign the Contract.
- The applicant must appoint an Applicant Representative whom the applicant's governing Board Chair or Officer deems capable of representing the application during the Appropriation process.
- Please provide seven (7) complete copies of each application. Provide concise answers on two-sided, white, 3-hole punched, 8½ x 11 paper. Staple each copy in the upper left corner. Do not submit copies in folders, binders, etc. Do not include extra materials. In addition, provide a PDF copy of the signed application to Info@ResortTax.org.
- Incomplete applications may not be considered for funding. It is the applicant's responsibility to provide all information requested in the proper format.
- Questions? Contact: Whitney Brunner, Administrative Officer (406) 995-3234, Info@ResortTax.org

APPLICATION DEADLINE: Monday, April 6, 2015 3:00 p.m.

- Applications must be received (not postmarked) by the deadline or they will not be considered.
- Applications will be date and time stamped when received at the resort tax office. Applications will be addressed at the Question and Answer Session in the order in which they were received at the resort tax office.

Mail applications to:
Big Sky Resort Area District
PO Box 160661
Big Sky, MT 59716

Drop off applications at:
11 Lone Peak Drive, Suite 204
Town Center, Big Sky, MT

QUESTION & ANSWER: Wednesday, May 13, 2015 1:00 p.m.

APPROPRIATIONS MEETING: Wednesday, June 10, 2015 1:00 p.m.

- To be held in the Big Sky Chapel Community Room, 510 Little Coyote Road, Big Sky, MT.
- The Applicant Representative must be present to answer questions regarding the application. Applicants that do not have a representative present at the meetings may not be considered for funding.
- The public is welcome at all meetings and will be given the opportunity to comment on the applications.

2015-2016 APPLICATION FOR RESORT TAX FUNDS

PLEASE NOTE:

Permitting: All applicants are responsible for securing any necessary permits for proposed projects.

Bidding Policy: Resort Tax Board policy states that project line items exceeding $50,000 are required to get two bids. If the lowest bidder is not accepted, the entity is to provide a written explanation to the Resort Tax Board.

Alcohol Policy: It is the Big Sky Resort Area District Board's policy to not use resort tax funds to provide for the consumption of alcohol. This policy is applicable for active board members and employees of Big Sky Resort Area District and its appropriation funded entities.

Appropriation funded entities are responsible for adherence to this policy and failure to do so may result in the entity being required to return resort tax funds previously paid or termination of unspent resort tax funds.

RESORTTAX
— BUILDING BIG SKY SINCE 1992 —

2015-2016 APPLICATION FOR RESORT TAX FUNDS

Applicant's Official Name: Women In Action

Project Name: Community Counseling and Substance Abuse Counseling Programs

Project Start Date: July 1st, 2015 **Project Completion Date**: June 30th, 2016

Representative: Rachel Thesing – Executive Director

Address: P.O. Box 161143, Big Sky, MT 59716

Telephone: 406-209-7098 **Email**: info@wiabigsky.org

Total Funds Requested $ 45,000.00

State your estimated payment request schedule for the coming year; amounts should total funds requested. Please enter dollar amounts.

	July '15	Aug '15	Sep '15	Oct '15	Nov '15	Dec '15
Payment Request	$ 3,750	$3,750	$3,750	$3,750	$3,750	$3,750
	Jan '16	**Feb '16**	**Mar '16**	**Apr '16**	**May '16**	**Jun '16**
Payment Request	$ 3,750	$3,750	$3,750	$3,750	$3,750	$3,750

I certify that the application and its attachments are correct to the best of my knowledge.

_____ _Board President_____
Signature **Title (Board Chair or Governing Officer)**

_Andrea Scholz_____ _____
Printed Name **Date**

2015-2016 APPLICATION FOR RESORT TAX FUNDS

1) Provide a description of the entity and the Mission Statement.
State the entity's tax status/legal identity and when it was initiated.
What is the personnel makeup of your office; specifically how many are employees, how many are contractors and what are their duties? What is the full time equivalent (FTE) of each: ¼ , ½, ¾ or full time?
Unless previously provided to the resort tax office, please include a copy of the Articles of Incorporation.
(200 words max)

Women In Action (WIA) is a recognized 501c3 nonprofit located in Big Sky. WIA was founded in 2005 by a group of nine women concerned with the lack of social services available in Big Sky. Since 2005, Women In Action has been working within the Big Sky community to actively address the social needs of our rural resort community.

The purpose of Women in Action is to provide access and support to programs that improve the well-being of children and families in our under-served Big Sky community. All of our programs have been put in place through Women in Action's initiative, research, funding, and oversight.

Women In Action is a small grassroots organization with one 1/2 time paid staff. Our goal is to provide effective and cost efficient programs.

2) Provide a complete description of the project(s). Include the project(s) purpose, goals and objectives. For each project provide measurable objectives, i.e. how you will do something and in what timeframe. The information provided here should be specific regarding what the entity is requesting to be funded by resort tax. If requesting funds for Operations, identify the categories and assign a dollar amount (salaries, software, etc.) If permits are required, please specify what permits are required and what projects they apply to. Please be succinct.

The purpose of this request is to assist with funding for the Women In Action (WIA) Community Counseling and Substance Abuse Counseling Programs. The Community Counseling Program was established in 2009 in partnership with Montana State University's Human Development Clinic. The services offered through our program are one-on-one private, affordable and confidential counseling. The goal of this program is to provide affordable, quality private counseling services in a discreet location. The counseling program maintains confidentiality and support with mental health issues in a range of areas including depression, anxiety, relationship concerns, stress, grief/loss, life transition, child behavioral problems, substance abuse, work or academic concerns and other life struggles. The counseling program provides critical access to services for Big Sky residents unable to consider commuting to Bozeman and who would otherwise forgo necessary treatment. In 2014, the program provided 223 hours of community counseling. The MSU Human Development Clinic's supervisor provides a monthly detailed report of the program that allows us to evaluate the utilization and effectiveness of the program. This detailed report also provides us with information that helps us assess whether adjustments need to be made to improve the quality and efficiency of the program

In February 2013, WIA expanded the Community Counseling Program to include a Substance Abuse Counseling Program in partnership with Alcohol and Drug Services of Gallatin County. The goal of this program is to provide support to residents who need substance abuse intervention and treatment services, which have previously been unavailable in Big Sky. The effects of substance abuse are cumulative, significantly contributing to costly social, physical, mental, and public health problems including teenage pregnancy, sexually transmitted diseases, domestic violence, child abuse, motor vehicle crashes, physical fights and crime. In 2014 the program has provided unduplicated services to 49 individuals. The Executive Director of ADSGC provides a monthly detailed report of the program that allows us to evaluate the utilization and effectiveness of the program. This detailed report also provides us with information that helps us assess whether adjustments need to be made to improve the quality and efficiency of the program.

3) Is the project within the resort tax district? (25 words max)

The Women In Action Community Counseling and Substance Abuse Counseling Programs are located in offices in Big Sky that are within the resort tax district.

Please note: Not every project will fulfill questions #4 through #8. Applications will not be rated on the ability to fulfill multiple questions.

Does the entity and/or project…

4) Benefit the community at large including residents, visitors and tax collectors/the business community? (50 words max)

The counseling programs improve the overall health and wellbeing of the Big Sky community by providing critical access to quality, confidential and affordable counseling services for those unable to commute to Bozeman for care. Big Sky residents, visitors and businesses benefit by having productive, supported and well cared for community members.

5) Promote tourism and development, help make Big Sky a world class resort community and increase resort tax revenue? (50 words max)

6) Support or improve critical infrastructure, public health, safety and/or welfare in the world class community? (50 words max)

Women In Action's programs improve the public health and overall welfare of the Big Sky Community by providing access to critical services such as general counseling services, drug and alcohol services, as well as programs that provide educational opportunities and support to local children and families.

7) Involve collaboration among entities in the community to meet common goals? (100 words max)

WIA partners with the Big Sky Community Food Bank to provide office space for the Substance Abuse Counseling Program. WIA collaborates with local health providers, HR directors and other community leaders to disseminate information about the counseling programs. WIA, in collaboration with MSU Human Development Clinic and Alcohol and Drug Services of Gallatin County, is addressing the mental health needs of the Big Sky Community. WIA shares an office with the Community Counseling Program in order to keep overhead costs low. WIA has also partnered with the Big sky School District, THRIVE and YCCF to provide the Parent Liaison and CAP program to the Big Sky School District.

8) Fill a community need not currently or adequately being satisfied? (50 words max)

Based on a Community Health Needs Survey in 2012, substance abuse and mental health counseling were a major health concern/need by a majority of survey respondents. Prior to the implementation of our programs, there was a lack of access to mental health services in our underserved rural community. WIA provides the <u>only</u> counseling services currently provided in Big Sky.

2015-2016 APPLICATION FOR RESORT TAX FUNDS

Provide the following financial documents:

9) Copy of the entity's complete operating budget for the period 07/01/15 through 06/30/16.

If your fiscal year does not coincide with this time period, please provide complete budgets for the entity's fiscal year that covers the aforementioned time period. For example, if the entity's fiscal year corresponds with a calendar year, provide two budgets 1) 01/01/2015 through 12/31/2015 and 2) 01/01/2016 through 12/31/2016.

10) Organization's Profit and Loss Report, Budget vs. Actual Report and Balance Sheet from your previous completed fiscal year.

11) Organization's Profit and Loss Report, Budget vs. Actual Report and Balance Sheet from your current fiscal year to date.

12) For applicants with mill levy authority please provide the following:

a. A map of your district's boundaries

b. The current taxable value of your district

c. If applicable, the current mill levy rate

d. **Using the information above, provide a detailed budgetary breakdown of the potential tax burden per $100,000 value, for property owners within your district if mill levy authority would be used to fund this project rather than resort tax funds**.

RESORTTAX
— BUILDING BIG SKY SINCE 1992 —

2015-2016 APPLICATION FOR RESORT TAX FUNDS

TOTAL ORGANIZATIONAL BUDGET

(to include all organization projects and programs; not only those requesting funding for in this cycle)

Total budget for the year the entity is requesting funding $ 170,500.00

What percentage of the above budget is the entity requesting from resort tax? 26 %

PRINCIPLE	ITEM		AMOUNT
Revenue	**Private Donor Contributions Total**		$84,000
	Private Donor Contributions In-kind		
	Public Grants		$45,000
	Fundraising Events		$35,000
	Sub Total Revenue		
	Other*		$6,500
	Total Revenue		$170,500
Expenses	**Paid Personnel (not including volunteer time)**	**# FTE Personnel** .5	$34,094
	Operations		$22,750
	Programming		$103,656
	Other*		$10,000
	Total Expenses		$170,500
Income	**Net Income**		$0

***Other Description**: 2014 Surplus funds

***Other Description**: Fundraising/Events

Capital Reserves	**On Hand Restricted****	$24,413.16
	On Hand Unrestricted**	$95,673.27
	Goal	$0

****Purpose of Restricted and Unrestricted Capital Reserves**: The purpose of these reserves is to provide adequate cash flow so that programs can operate effectively. The reserves also provide stability for our programs should we not raise adequate funds the current fundraising cycle.

RESORTTAX
— BUILDING BIG SKY SINCE 1992 —

2015-2016 APPLICATION FOR RESORT TAX FUNDS

RESORTTAX
— BUILDING BIG SKY SINCE 1992 —

2015-2016 APPLICATION FOR RESORT TAX FUNDS

TOTAL CASH FLOW 3-YEAR REQUIREMENT

(to include all organization projects and programs; not only those requesting funding for in this cycle

ITEM	2015	2016	2017	Total Cash Flow 3-Yr Requirement
Paid Personnel (not including volunteer time)	$34,094	$34,094	$34,094	$102,282
# of FTE Personnel	.5	.5	.5	**NA**
Operations	$22,750	$22,750	$24,000	$69,500
Programming	$103,656	$93,656	$108,656	$305,968
Capital Expenditures	$0	$0	$0	$0
Other – Fundraising/Events	$10,000	$10,000	$10,000	$30,000
Total	$170,500	$160,500	$176,750	$507,750

RESORT TAX REQUEST	$45,000	$45,000	$45,000	$135,000

Describe financial increases and decreases and the projects for which resort tax funds may be requested.

2015 This year we have lost two of our largest donors. These donors are no longer affiliated with Big Sky or the state of Montana . We have been able to replace these fudning sources with alternative donors and event revenue however we have had to resturcture how individual programs are funded and where we source that fuding.

2016

2017