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.

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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: Big Sky Trails Recreation and Parks District

Project Name: Operations

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

Representative: Steven Johnson, Vice Chair

Address: PO Box 161395, Big Sky, MT 59716-1395

Telephone: 406-539-6660 **Email**: johnsons731@aol.com

Total Funds Requested $ 7,500

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	$		$2,000			$2,000
	Jan '16	**Feb '16**	**Mar '16**	**Apr '16**	**May '16**	**Jun '16**
Payment Request	$		$2,000			$1,500

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

Signature **Title (Board Chair or Governing Officer)**

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)

The Big Sky Trails, Recreation & Parks District is dedicated to the creation and implementation of recreation programs and for the creation, acquisition, establishment, operation, improvement, funding and maintenance of parks, trails and recreation in the greater Big Sky area. This includes but is not limited to: parks, athletic facilities, ball fields, trails, rest rooms, picnic shelters and camp grounds. This entity consists of two special districts, one in Gallatin County (July, 2011) and the other in Madison County (January, 2012), whose operations are linked by an inter-local agreement. It is tax exempt. Copies of the county resolutions creating these districts, the inter-local agreement, a map of the district, and the bylaws are included with this application for your files. The five member board consists of two volunteer residents from Madison County, two from Gallatin County and one from either.

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 Big Sky Trails, Recreation & Parks District was created as a non-taxing entity to give the community of Big Sky the opportunity to establish and manage its own park district land, rather than to have its lands incorporated into and governed by separate park districts in Madison and Gallatin Counties. To fund its operations, the board plans to explore grant funding opportunities not available to other non-governmental entities in Big Sky. The requested funding is to support basic administrative costs, including insurance, stationery, postage, printing and the like, as well as expenses associated with the preparation of grant applications. To date, requests for funding to the county commissions have been denied.

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

Yes.

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)

Yes, as stated in the bylaws, and county resolutions creating the District.

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

Yes, our mission addresses the development and enhancement of essential recreation resources in the greater Big Sky area, across county boundaries.

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

Yes, recreational infrastructure.

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

The Big Sky Trails, Recreation & Parks District works closely with Big Sky Community Corporation.

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

As a governmental entity, the Big Sky Trails Recreation & Parks District plans to explore opportunities for funding sources not currently available to other non-governmental/non-profit organizations in Big Sky, like the Big Sky Community Corporation.

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.

As a new start-up organization, our operating budget of $7,500 simply consists of $1,000 for insurance, $6,000 for grant research and applications, and $500 for other administrative costs.

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

The finances of the Big Sky Trails, Recreation & Parks District are managed by the Gallatin County Treasurer. Financial statements can be provided from that office.

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

The finances of the Big Sky Trails, Recreation & Parks District are managed by the Gallatin County Treasurer. Financial statements can be provided from that office.

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**.

The Big Sky Trails, Recreation & Parks District currently does not have mill levy authority.

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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 $ $7,500

What percentage of the above budget is the entity requesting from resort tax? 100 %

PRINCIPLE	ITEM		AMOUNT
Revenue	Private Donor Contributions Total		
	Private Donor Contributions In-kind		
	Public Grants		
	Fundraising Events		
	Sub Total Revenue		
	Other*		
	Total Revenue		$0
Expenses	Paid Personnel (not including volunteer time)	# FTE Personnel: 0	
	Operations		$7,500
	Programming		
	Other*		
	Total Expenses		$7,500
Income	Net Income		($7,500)

***Other Description**: _____

***Other Description**: _____

Capital Reserves	On Hand Restricted**	
	On Hand Unrestricted**	$1,500
	Goal	

****Purpose of Restricted and Unrestricted Capital Reserves**: working capital

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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)				
# of FTE Personnel				**NA**
Operations	$7,500	$10,000	$10,000	$27,500
Programming				
Capital Expenditures				
Other				
Total	$7,500	$10,000	$10,000	$27,500

RESORT TAX REQUEST	$7,500	$10,000	$10,000	$27,500

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

2015 **Grant applications, trail design and permitting, park master planning**

2016 **Grant applications, trail construction**

2017 **Grant applications, parks project**