FY21 APPLICATION TRAINING

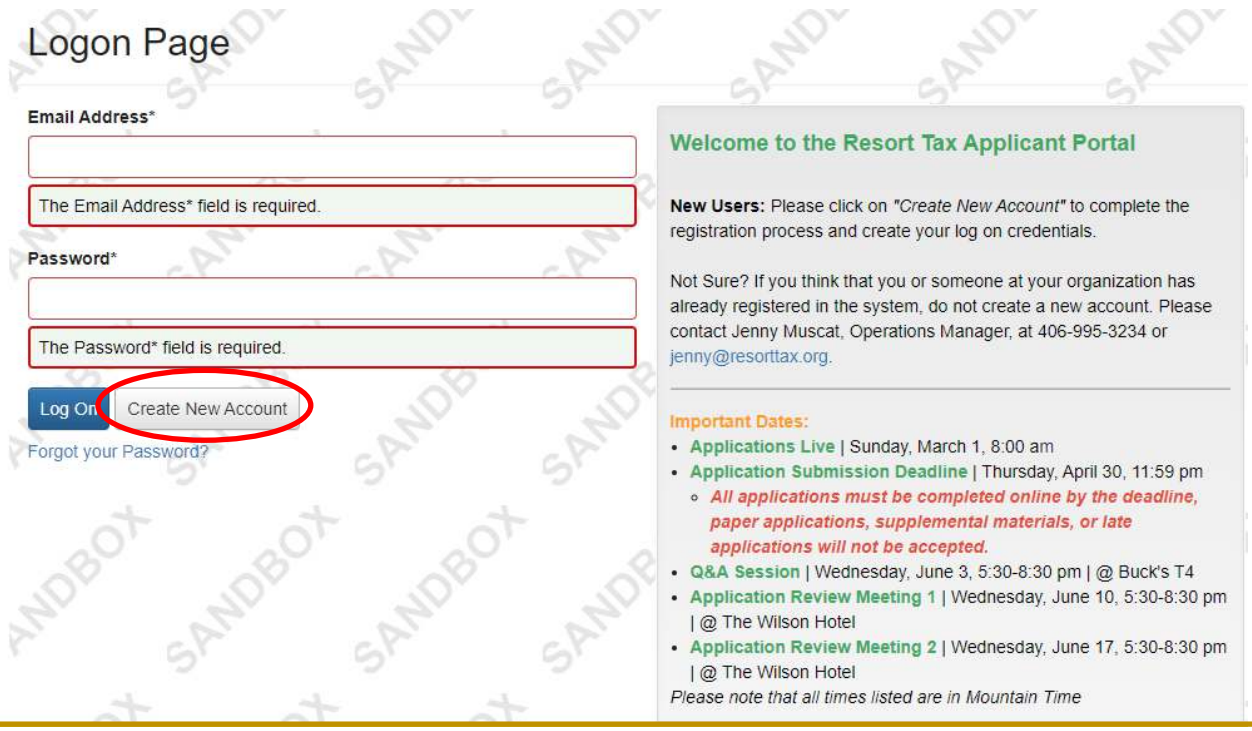
TABLE OF CONTENTS

Helpful Hints

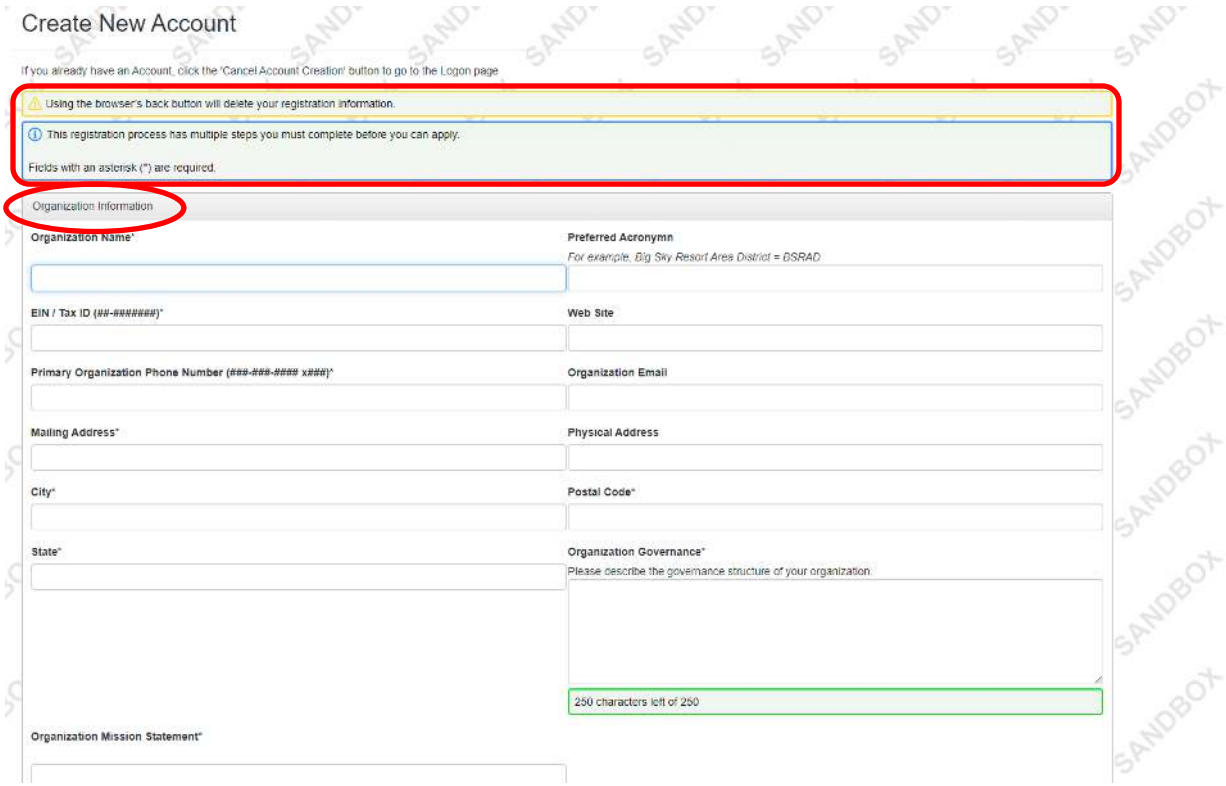
- Read all instructions throughout the application
- Questions marked with * are required
- The application auto-saves as you are working
- You may save your application at any time and return to edit
- Once application has been submitted it can no longer be edited
- Please only provide the information requested within this application (Supplemental materials will not be accepted or included in the final board review)
- All user and organization information entered will be remembered for future funding cycles

CREATING A NEW ACCOUNT

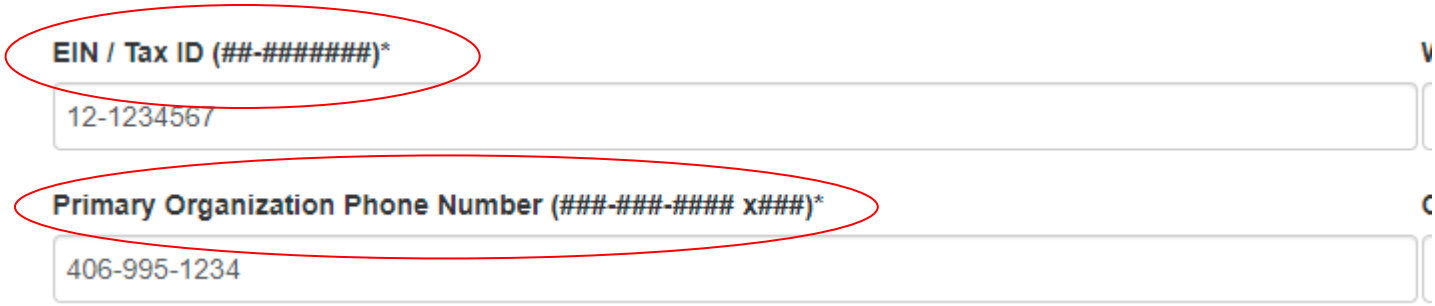
- To create an account and access the application visit https://resortax.org/funding/ or https://www.grantinterface.com/Home/Logon?urlkey=rtg



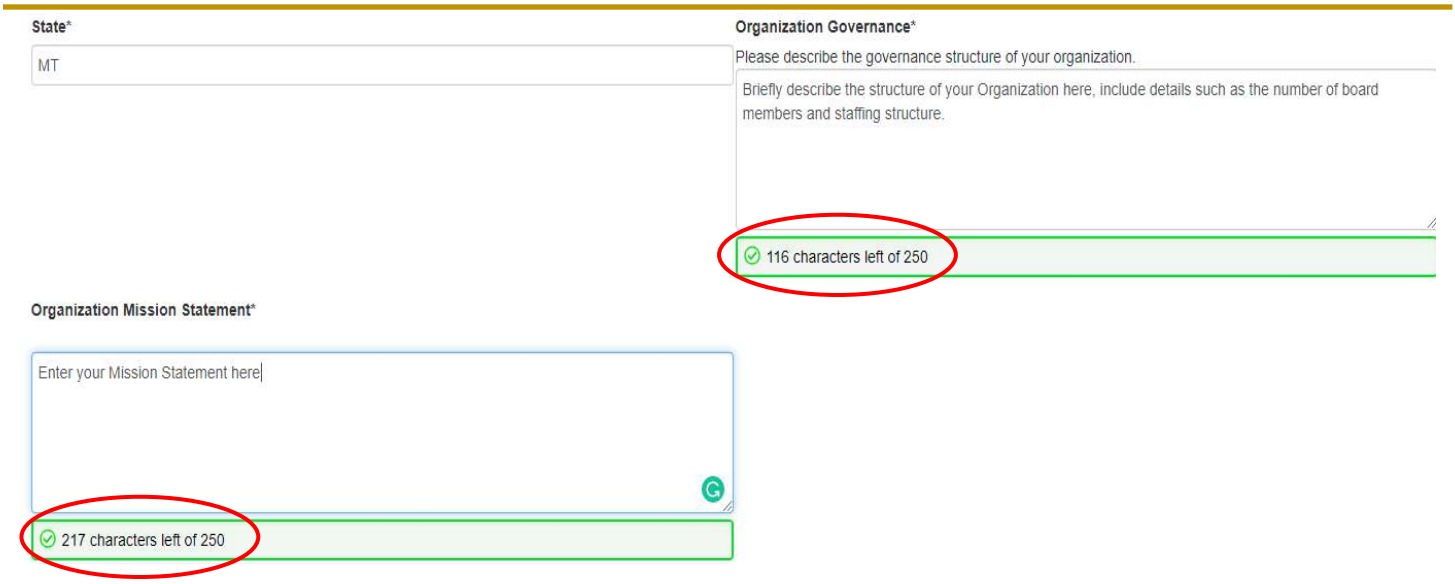
- Complete all fields on the Create New Account page. Start by completing the Organization Information.
- Be sure to read the information in the yellow and blue boxes at the top of the screen.



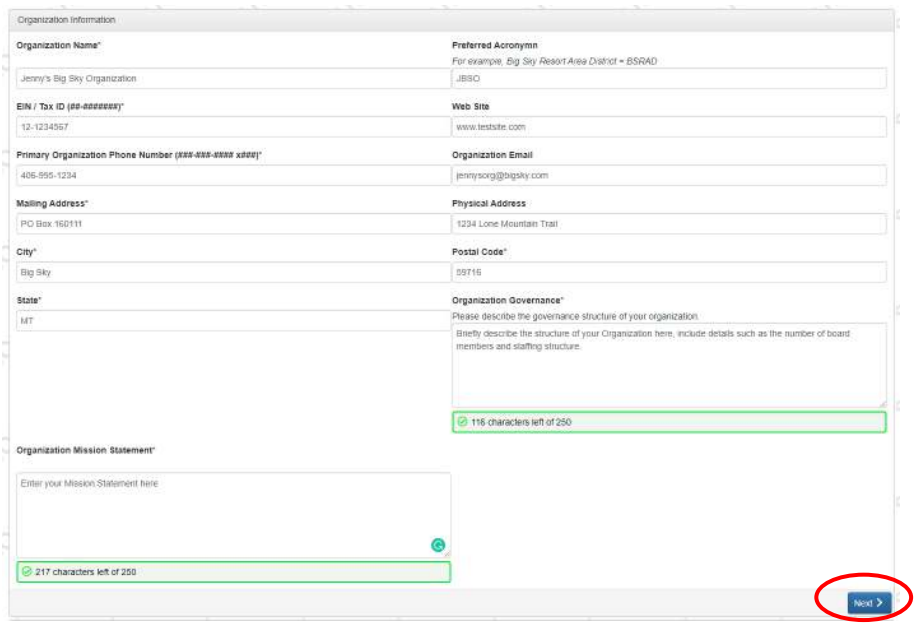
- When entering the Tax Id and Phone Number be sure to enter in the correct format as outlined in the headers.



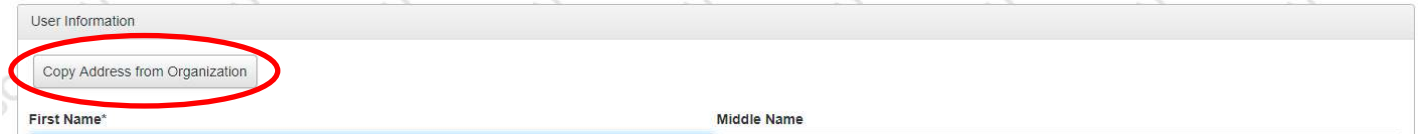
- There are 2 short answer questions under the Organization Information section, be aware of the character limit and keep your answers brief.



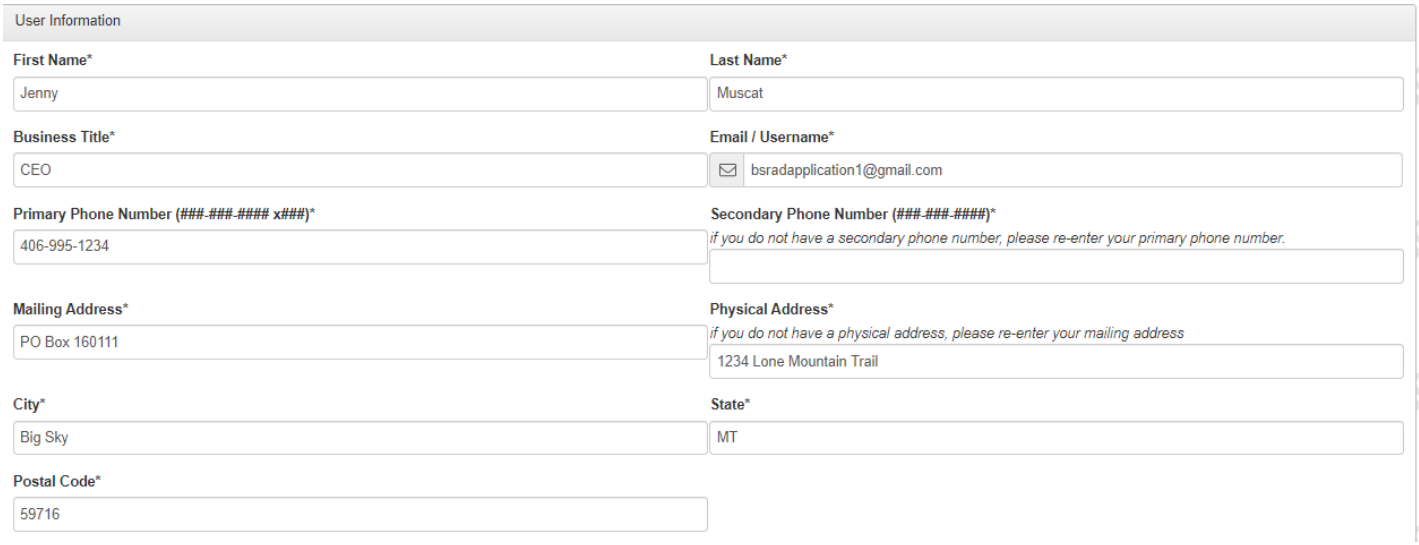
- Once you have answered all Organization Information questions click "Next".



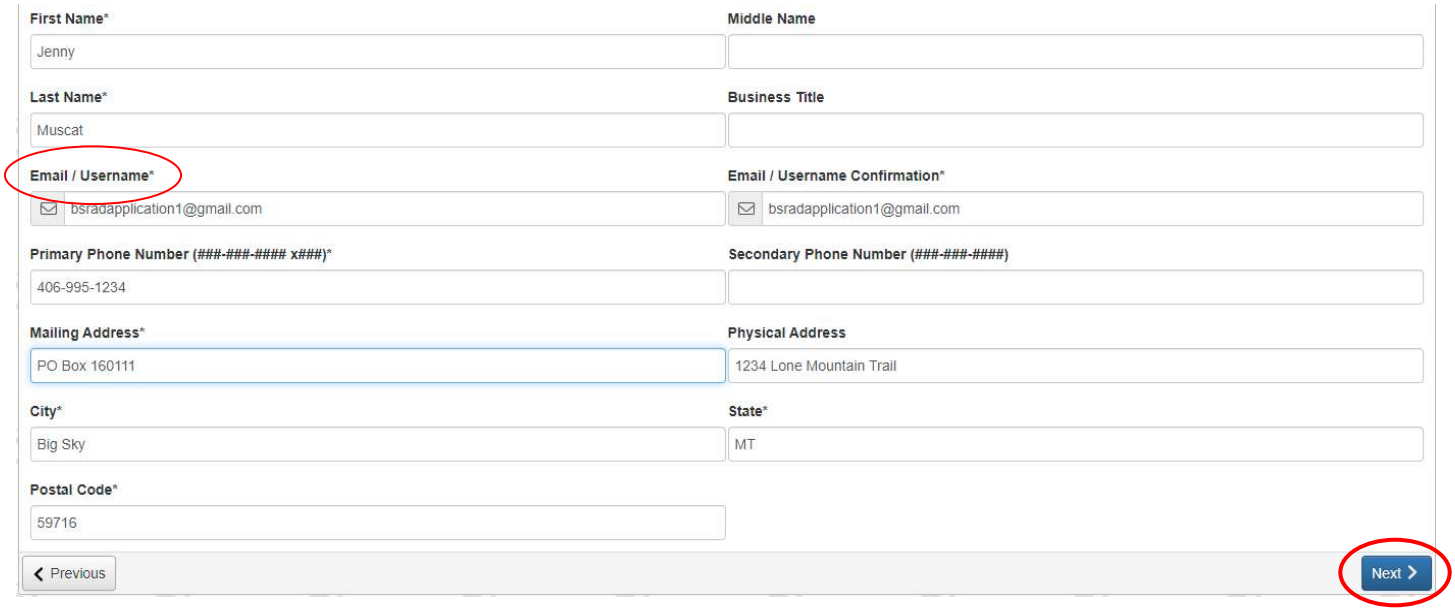
- Enter the User Information for whomever is completing the application. If the person completing the application has the same address as the Organization click the “Copy Address from Organization” button. If the person completing the application has a different address fill out address fields accordingly.



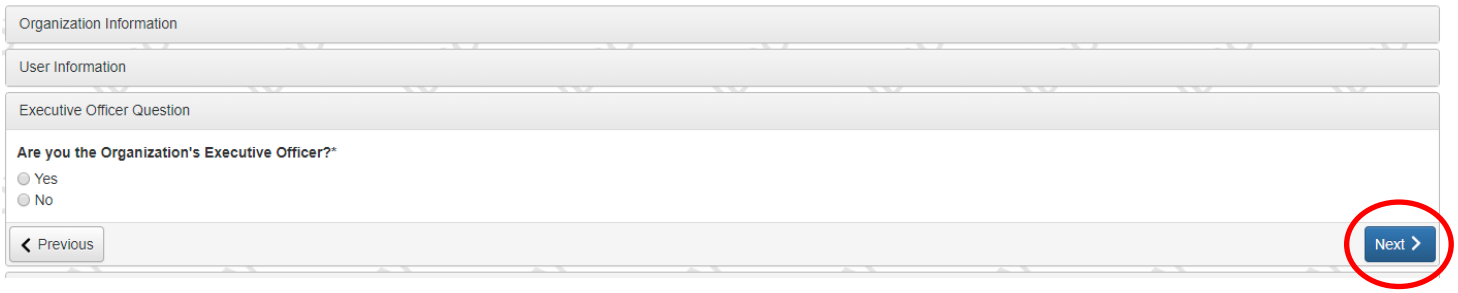
- If you do not have a “Secondary Phone Number” or “Physical Address” you may enter your “Primary Phone Number” and your “Mailing Address” again, since both fields are required.

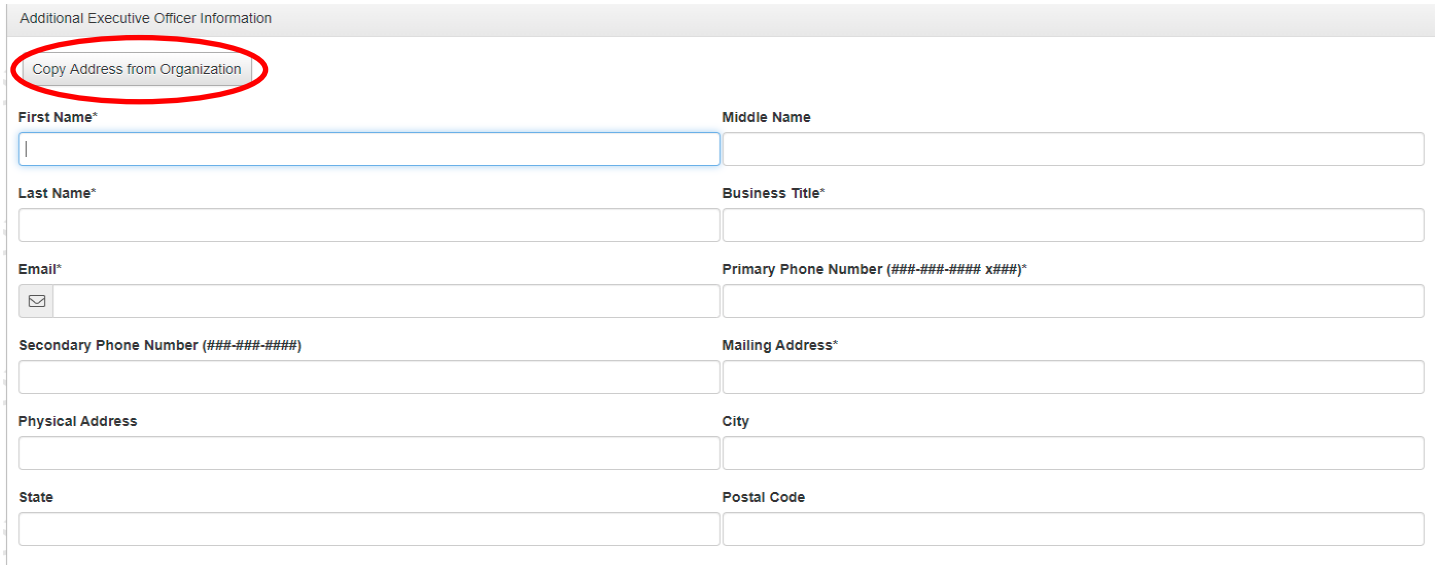


- *Please note that the email entered will become your username.*
- Once all necessary information is filled in click “Next”.

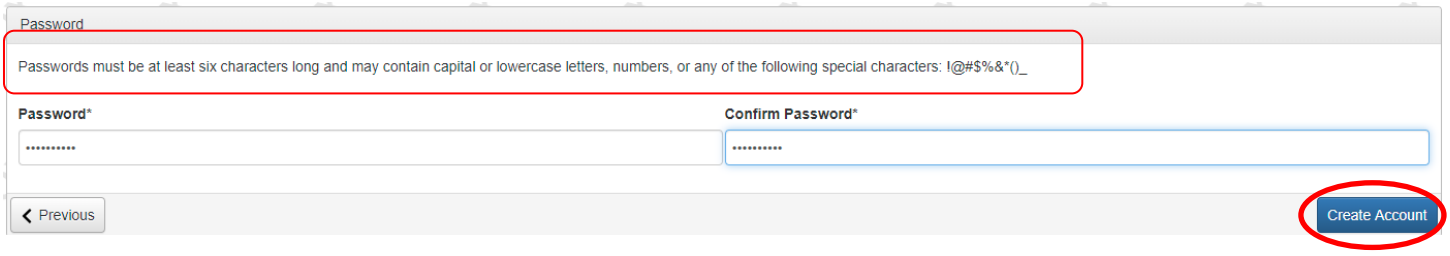


- Answer if the person completing the application is the Executive Officer accordingly and select “Next”.
- If you are NOT the Executive Officer and select “No”, an additional section will generate requesting information for the Executive Officer. Again, you can copy the Organization’s address entered previously if it is the same.
- If you ARE the Executive Officer and you select “Yes” your next step will be to create a password.

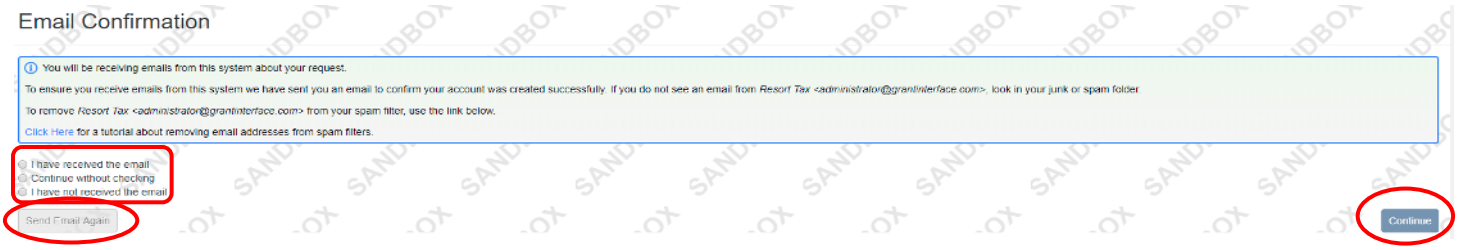


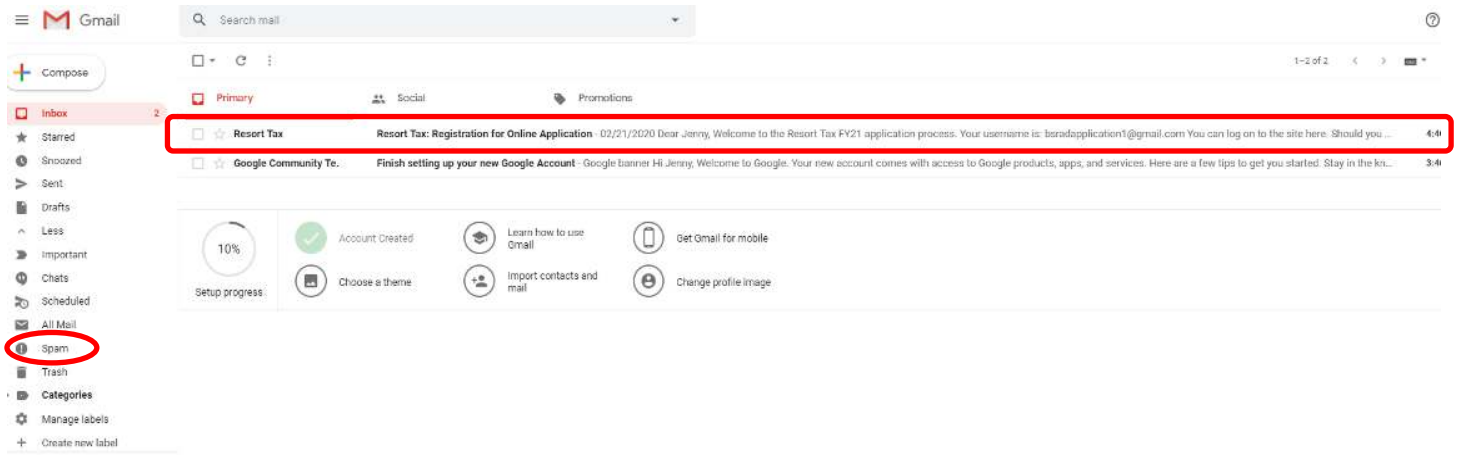


- Create a password for you account and make sure it meets the requirements outlined in the instructions.
- Once entered click “Create Account”.



- You will be asked to confirm your email address.
- Log into the email used to create your account, to verify the email was received (you may need to check you spam folder.)
- The email will contain a link to the log on page.
- When you receive the email select “I have received the email” and “Continue”.
- If you did not receive the email select “I have not received the email’ and click “Send Email Again.”





02/21/2020

Dear Jenny,

Welcome to the Resort Tax FY21 application process.

Your username is: **bsradapplication1@gmail.com**

You can log on to the site here. Should you have any trouble logging in feel free to contact the Resort Tax office at 406-995-3234.

Starting March 1 you may begin the application process. Once you are logged on click the "Apply" button at the top of the page, scroll down to the FY21 Application for Funding and click the blue "APPLY" button to begin your application.

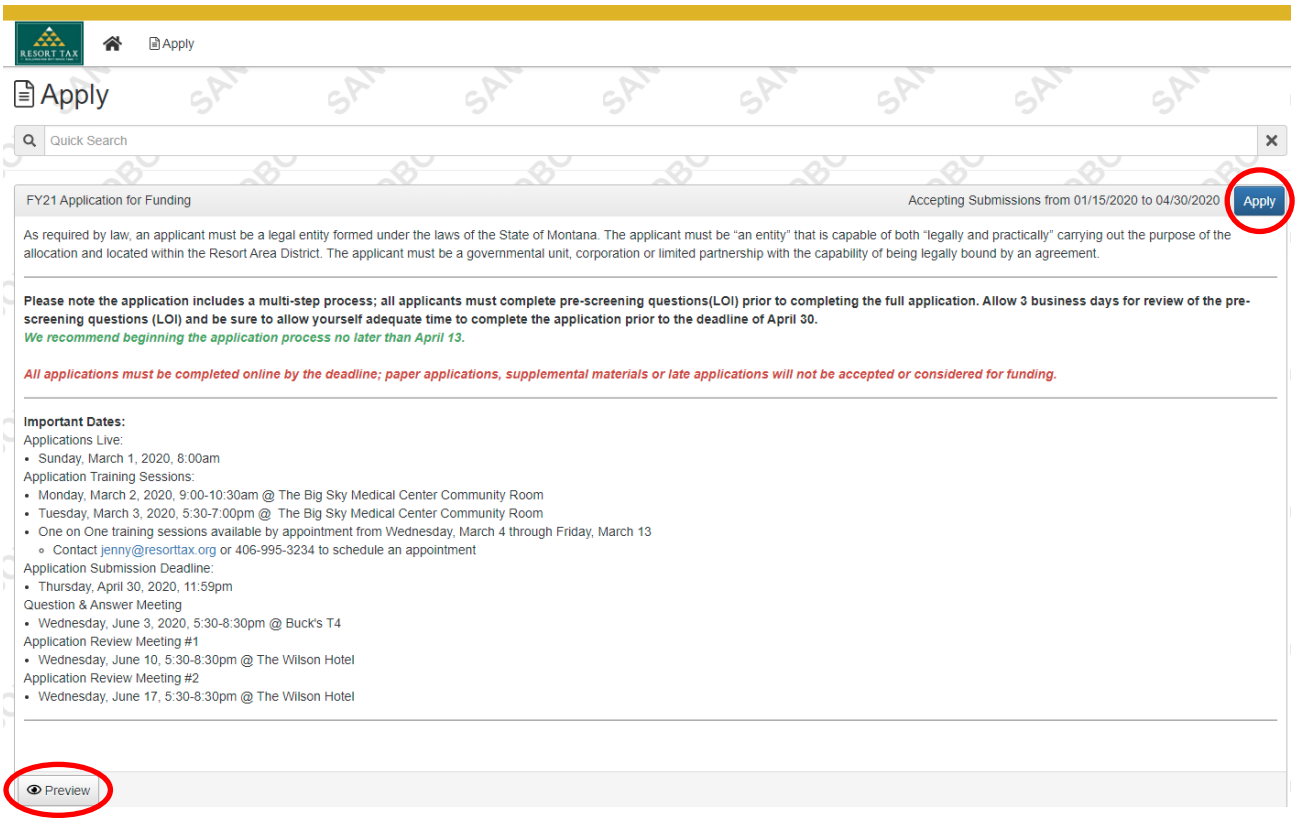
Please note the application includes a multi-step process; all applicants must complete Pre-Screening Questions (LOI) prior to completing the full application. Allow 3 business days for review of the pre-screening questions and be sure to allow yourself adequate time to complete the application prior to the deadline of April 30. We recommend beginning the application process no later than April 13.

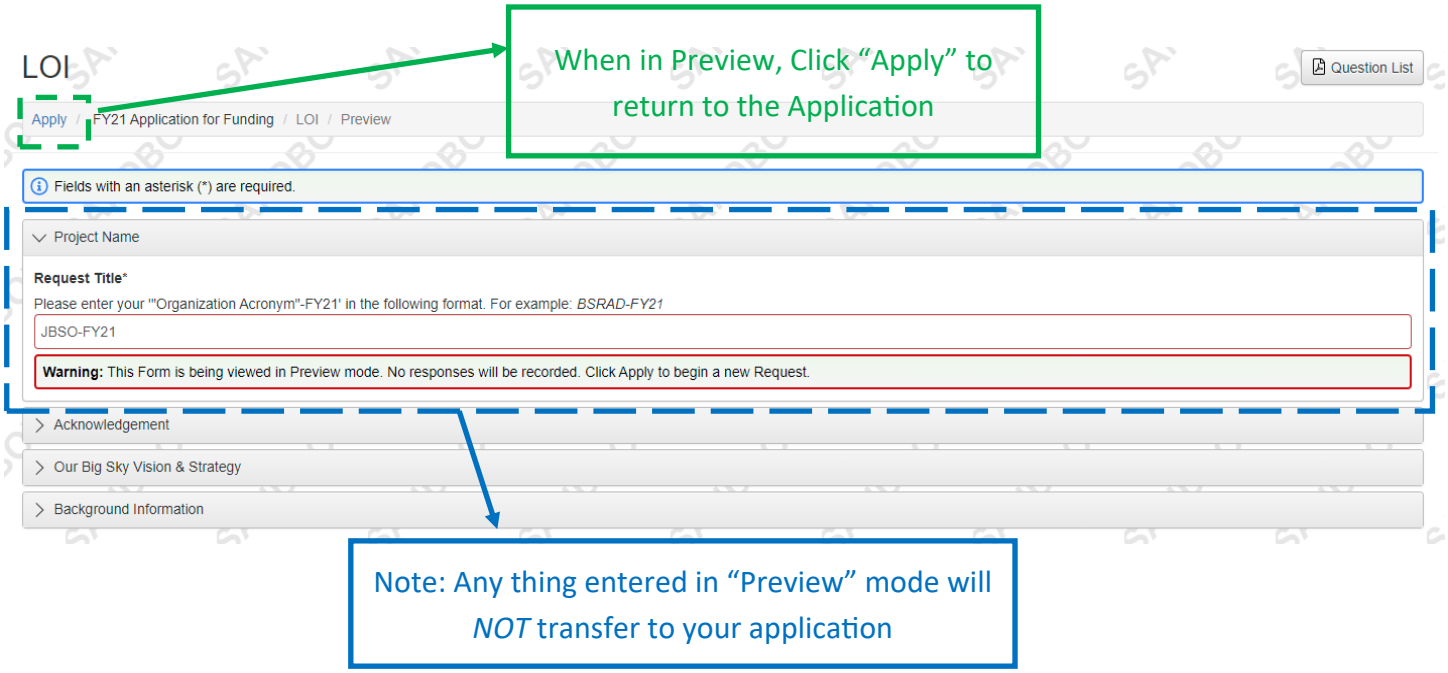
Thank You,
Resort Tax

Note the instructions for applying and the recommended start date

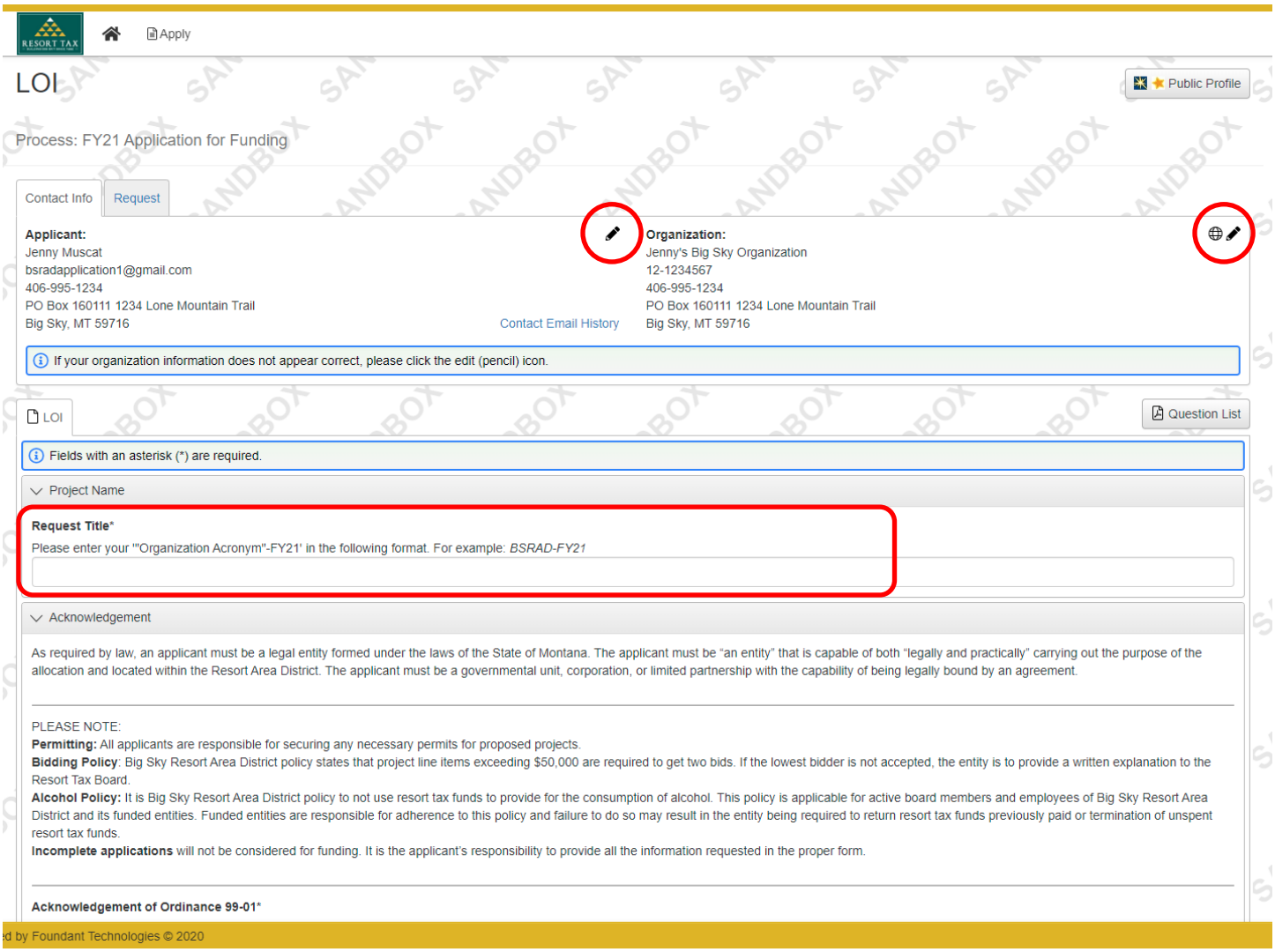
APPLYING: PRE-SCREEING QUESTIONS

- Read through all instructions and important dates prior to applying.
- When you are ready to begin the Pre-Screening Questions (LOI) click “Apply”.
- You may view questions by selecting the “Preview” button but note that any information you enter while in preview mode will *NOT* transfer to your application.
- You may save your application and return at any time.





- Please review your contact information; you can update it by clicking on the “Pencil” icon.
- If all information is correct, begin your application.



- As you complete the application you will notice different answer fields and links that can be opened.

Fields with an asterisk (*) are required.

Project Name

Request Title*

Please enter your '"Organization Acronym"-FY21' in the following format. For example: *BSRAD-FY21*

JBSO-FY21

Acknowledgement

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 allocation 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 an agreement.

PLEASE NOTE:
Permitting: All applicants are responsible for securing any necessary permits for proposed projects.
Bidding Policy: Big Sky Resort Area District 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 Big Sky Resort Area District 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 funded entities. 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.
Incomplete applications will not be considered for funding. It is the applicant's responsibility to provide all the information requested in the proper form.

Acknowledgement of Ordinance 99-01*

The purpose of the request must be within the purposes of the District's Legal Ordinance No. 99-01, as amended, effective March 22, 2018, and must benefit the community at large, and not a single person, organization, or corporation.

CLICK HERE TO VIEW ORDINANCE 99-01

I acknowledge that I have read Ord. 99-01

Be sure to read all instruction sections even though they require no action

Representation Acknowledgement*

I certify that the Governing Board Chair or Officer deems me capable of representing my organization on this application and certify that all information is as accurate as possible. Additionally, I certify that the Governing Board Chair or Officer is capable of signing agreements associated with fund distribution.

I certify that I am designated to represent my organization

Essay questions will have larger text areas.
Be aware of character limits in all essay questions.

Background Information

Organizational Scope of Work*

Explain how your organization's scope of work is consistent with the purpose of the use of Resort Tax:

500 characters left of 500

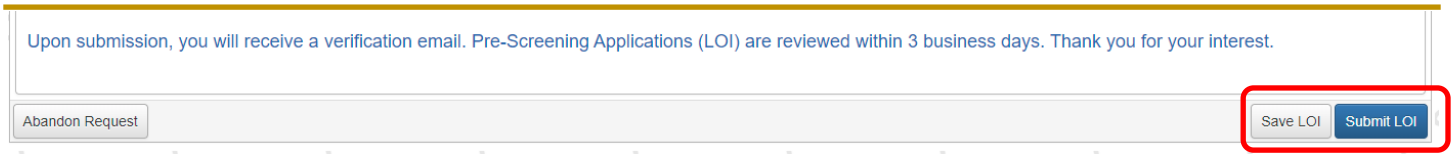
People Served*

How many people does your organization serve on an annual basis?

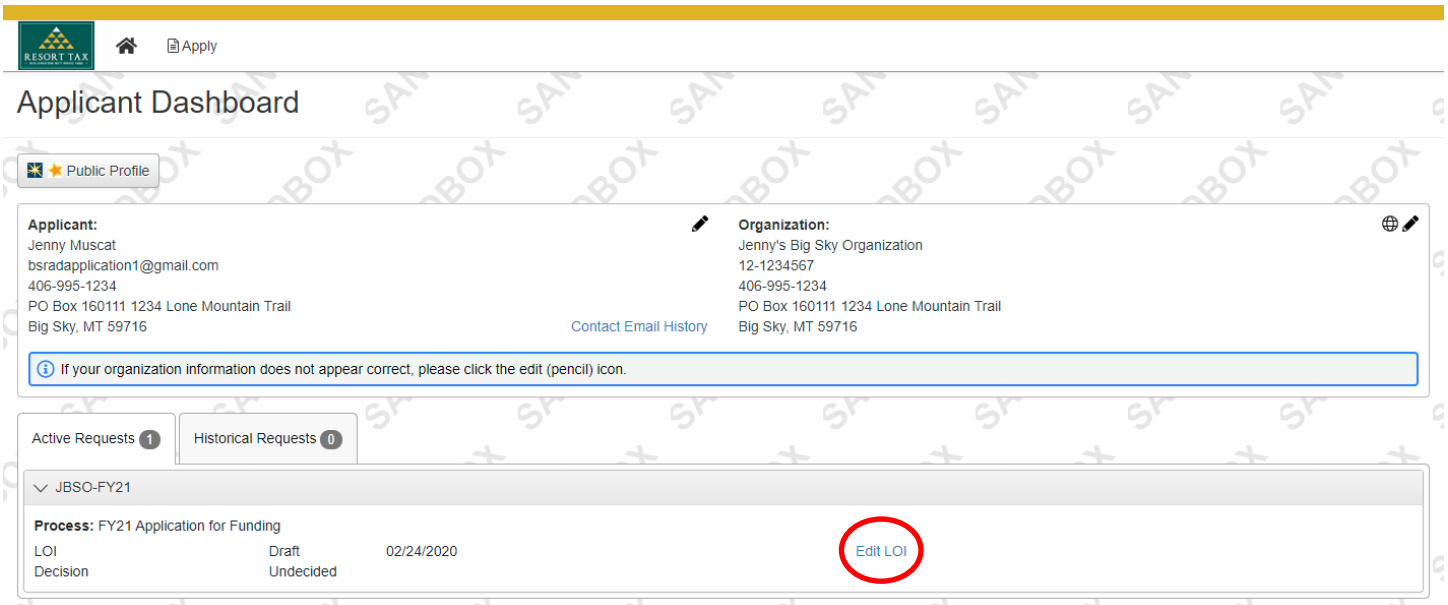
#

Questions that ask for a number must be entered with just the numbers.
The form does not accept special characters such as $, #, %

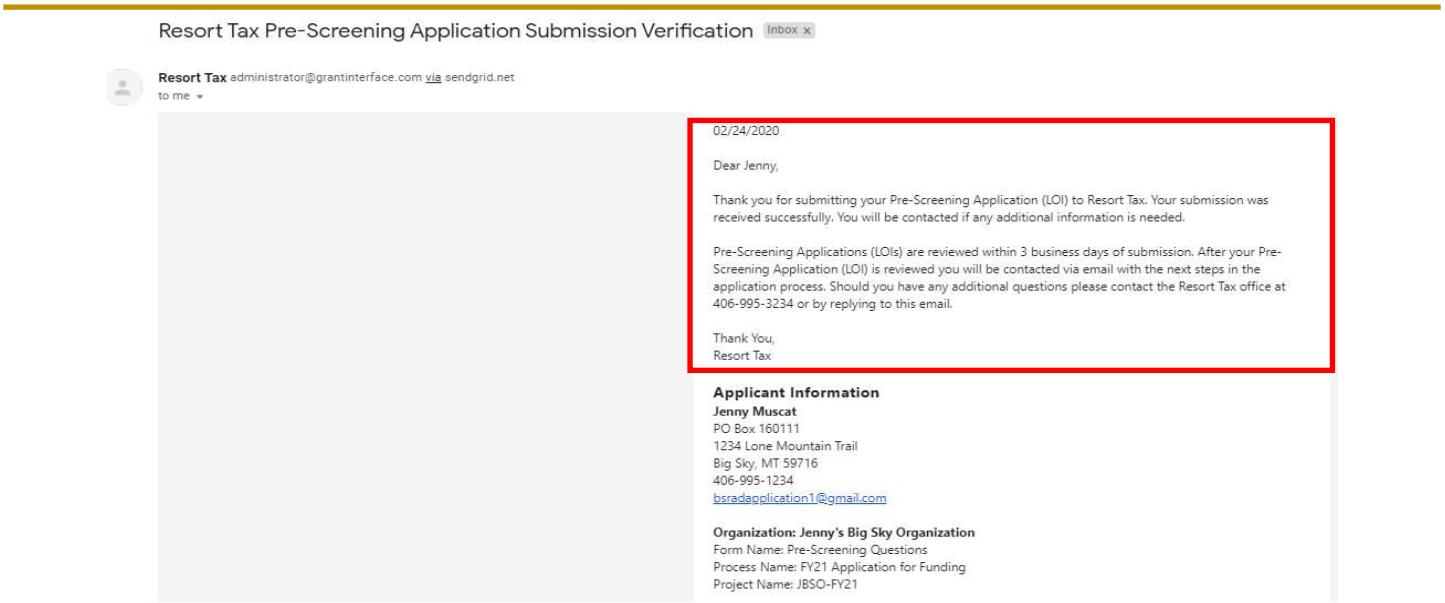
- When you have answered all Pre-Screening questions (10 questions total) please proof read all of your answers and ensure all information is accurate.
- You may save the Pre-Screening LOI at any time and return to edit.
- If you are ready to submit your answers select “Submit LOI”.



- To return to your Pre-Screening Application select the “Continue” button.
- If you log out and need to return to you application at a later date, log in to your account and from the home page select “Edit LOI” to continue working on your Pre-Screening Application.



- After submitting your Pre-Screening Application (LOI) you will receive a Submission Verification email.
- Please allow BSRAD staff 3 business days to review your submission.



- After your Pre-Screening Application (LOI) has been reviewed, you will receive an email invitation to submit a full application. There are important instructions in the email as well as a link which will direct you to the log on page to access the full application.

02/24/2020

Dear Jenny,

Resort Tax is pleased to invite Jenny's Big Sky Organization to continue the application process for your JBSO-FY21 request as outlined in your Pre-Screening Application.

Please log on to https://sandbox.grantinterface.com/Home/Logon?urlkey=rtg, to access and complete step 2 of the application. To complete the next step, scroll to the "Active Requests" tab and select "Edit Application" to continue the process. **DO NOT CLICK "APPLY", YOU HAVE ALREADY BEGUN AN APPLICATION.**

Please be advised, however, that this invitation to submit a full proposal does not imply a guarantee of funding.

We look forward to reviewing your application.

Important Appropriations Dates:

- Thursday, April 30, 11:59 pm (Mountain Time) | Application Deadline
- Wednesday, June 3, 5:30-8:30 pm (Mountain Time) | Q&A Session @ Buck's T4
- Wednesday, June 10, 5:30-8:30 pm (Mountain Time) | Application Review Meeting 1 @ The Wilson Hotel
- Wednesday, June 17, 5:30-8:30 pm (Mountain Time) | Application Review Meeting 2 @ The Wilson Hotel

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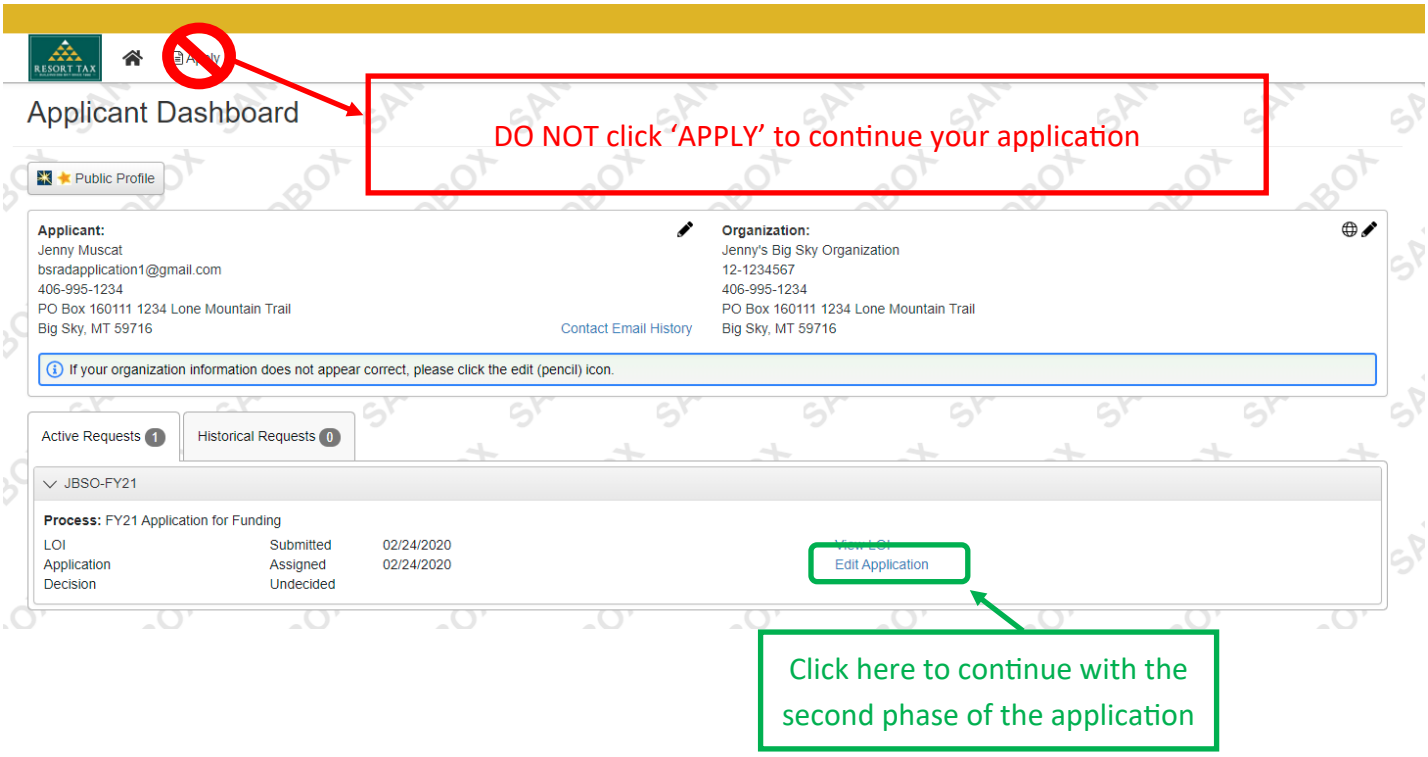
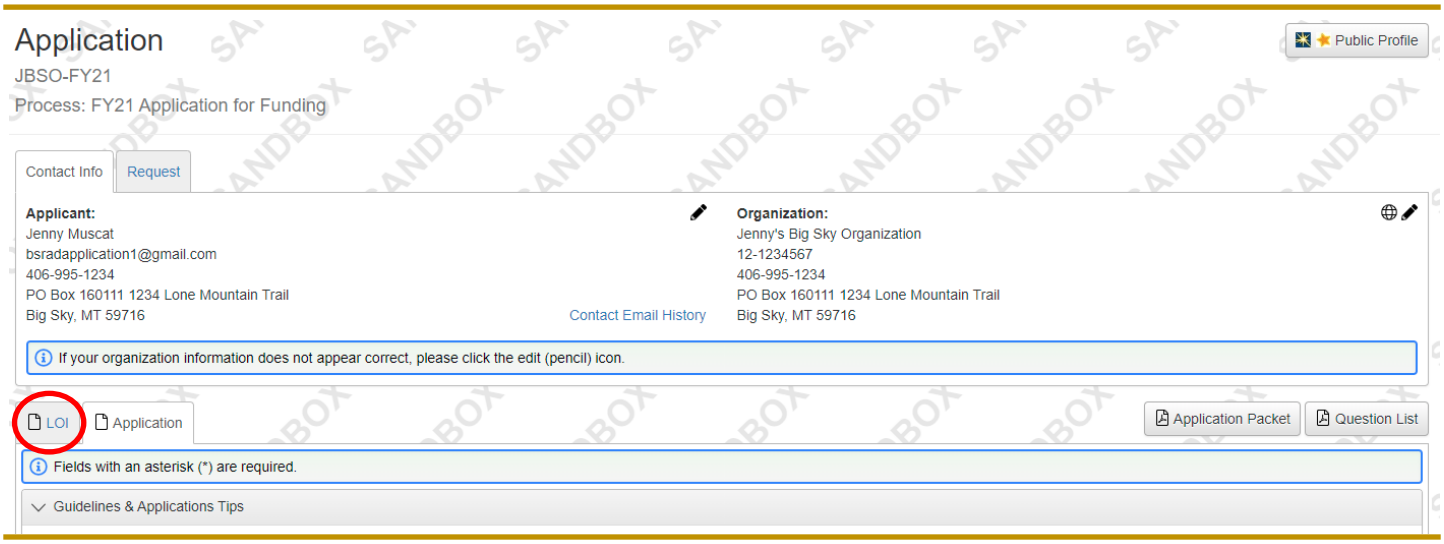
Sincerely,
Resort Tax
https://resorttax.org/

- Once logged in you will be brought to the home page. To begin working on the second phase of the application click on "Edit Application" under the "Active Requests" tab.
- DO NOT CLICK THE APPLY BUTTON AT THE TOP OF THE PAGE. YOU HAVE ALREADY BEGUN AN APPLICATION.

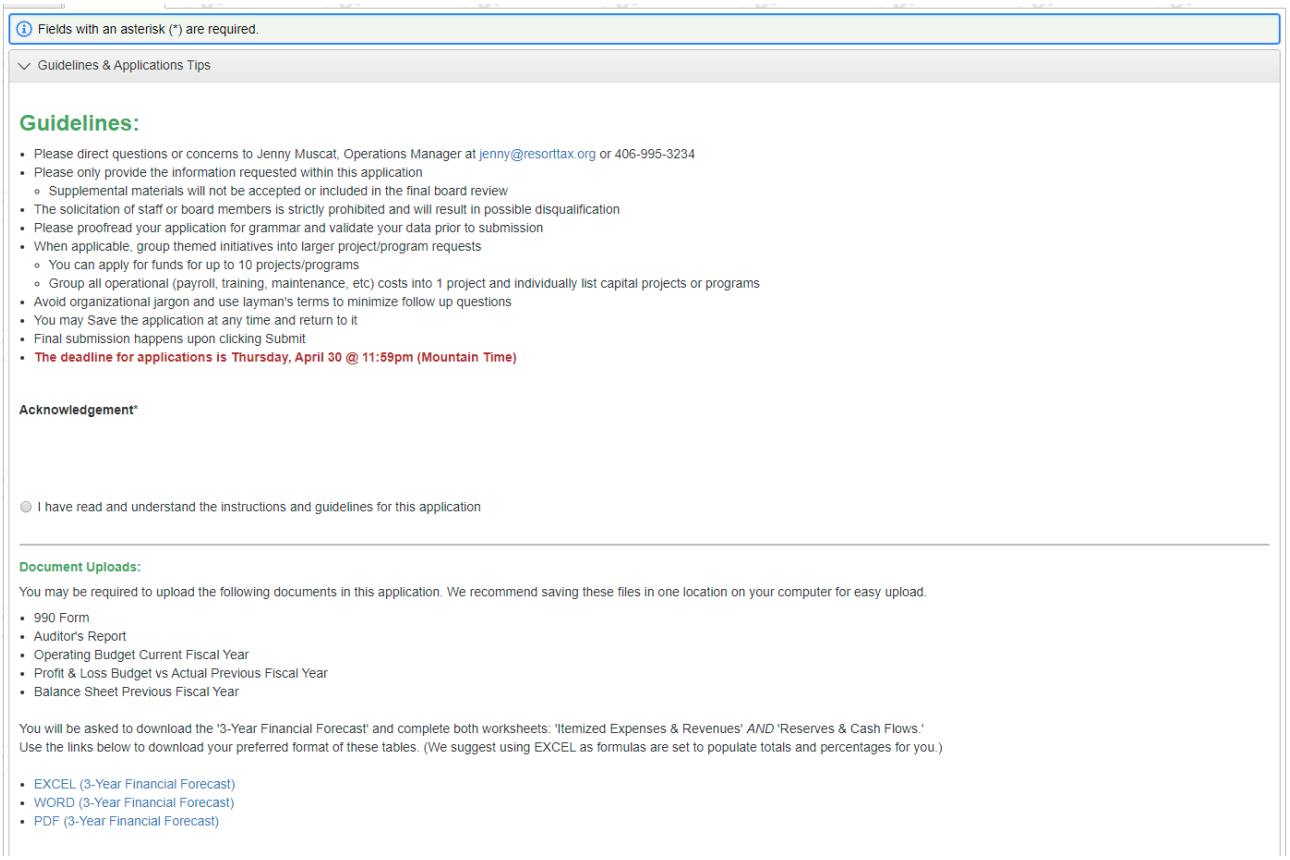


APPLYING: FULL APPLICATION

- An application tab will now be available.
- Note: You may view your Pre-Screening Application by clicking on the "LOI" tab. LOI's can not be edited or revised after submission.



- When beginning part 2 of the application, please be sure to read and acknowledge all guidelines and helpful tips.
- Later in the application you will be asked to upload financial documents including a "3-Year Financial Forecast" document which you will be required to download, complete, save, and upload.



- After reading and acknowledging the guidelines, you will continue to the "Background Information" section. Please complete this section with information regarding your ***organization*** (not project/program specific information).

Background Information

Please complete the following section with information about your organization:

Request Title*

Please enter your '"Organization Name"-FY21' in the following format. For example: *BSRAD-FY21*

JBSO-FY21

Note that the "Request Title" entered in the Pre-Screening Questions carries over for you

- You will see a variety of question types in the "Background Information" section, as well as throughout the application.

- **Radio Button & Explain Questions:**

Fees*

Does your organization charge any dues or fees? If yes please explain in the next question.

- Yes
- No

Explain Fees

If applicable, please explain any fees or dues your organization charges and what portion of your total revenue this accounts for:

Good information to include here is the rate of any fees or dues, the last time fees, and dues were increased, etc...

383 characters left of 500

- **Questions That Ask for Answers in Number Form:**

  Reminder: Answers must be entered with just numbers, special characters are not accepted.

FTE Count*

Please list the number of full-time employees in your organization. If you have none please enter 0:

15

PTE Count*

Please list the number of part-time employees in your organization. If you have none please enter 0:

5

- **Optional Questions:**

*Questions that do not have * are not required, complete if applicable*

Organizational Partnerships

Please explain any other organizations you have partnered with and provide details for any ongoing strategic partnerships:

Resort Tax values community collaboration! Please provide a list and details of organizations, projects, and programs you have collaborated on.

356 characters left of 500

- The application will expand below based on the number entered here. I.E. if your organization has 5 projects/programs you are requesting funds for, 5 "Project/Program Information" sections (one for each project/program) will generate below.

Number of Projects/Programs*

How many projects/programs are you requesting Resort Tax funds for?

Applicants can apply for funds for up to 8 projects/programs. When applicable, please consider grouping themed initiatives into larger project/program requests.

5

For applicants with multiple projects please note that the application will expand and create additional project/program information sections for each project you are requesting funding for based upon the number entered above. Please enter your projects in order of highest to lowest priority as you complete the application.

- Public Safety
- Financial Information
- Project/Program 1 Information
- Project/Program 2 Information
- Project/Program 3 Information
- Project/Program 4 Information
- Project/Program 5 Information
- Application Verification & Summary

- **Questions About Last Year's Request:**

Last Year's Forecasted Request*

In last year's application, what amount did you predict you would be requesting for this year (FY21)?

If you did not apply last year please enter 0.

Please reference question #5 "Total Cash Flow 3-Year Requirement" on last year's application to gather this data.

$ 75000

- **Variance Questions:**

Total Funds Requested FY21*

Please enter the total amount of funds your organization is requesting for all projects/programs for this year (FY21):

Please ensure that all requests for all projects add up to this total, the form does not calculate a total for you.

$ 100000

Explain Variance

If applicable, please explain any differences in your current request vs the amount entered on last year's application:

If the amount requested varies from what you predicted on last year's application please explain why and what caused this change.
If your request does NOT vary, or if you did not request funds last year, you may leave this answer blank.

263 characters left of 500

- **Payment Request Schedule Questions:**
- There are 12 questions for each month of FY21, please make sure the monthly amounts sum up to your total request amount, the application does not calculate sums for you.
- *Details about contracts and Award Orientations will be available after Application Review meetings.*

State your estimated payment request schedule FY21. Amounts should add up to *Total Funds Requested FY21.*

For any month you are NOT requesting funds please enter 0.

Important: July 15, 2020, will be the first day a payment can be requested. Funding will not be available until a contract has been signed and the Award Orientation has been completed.

July 2020 Estimate*

$ 0.00

August 2020 Estimate*

$ 10,000.00

September 2020 Estimate*

$ 10,000.00

- **Forecast/Prediction Questions:**

When projecting future requests, please ensure these numbers are as accurate as possible. While calculating these numbers keep the following in mind:

- **Economic Growth**
- **Staffing Changes**
- **Changes in Community Needs**

Future Funding Request FY22*

What is your forecasted Resort Tax request for FY22 (7/1/21-6/30-22)?

$ 120000

Future Funding Request FY23*

What is your forecasted Resort Tax request for FY23 (7/1/22-6/30/23)?

$ 125000

- If you answer “Yes” to the mill levy and public safety questions new sections will generate below.
- If you answer “No” you will not be asked to complete these sections.

“YES”

Mill Levy Authority*

Does your organization have mill levy authority?

- (•) Yes
- ( ) No

Tax Levy Information

For applicants with mill levy authority, please provide the following:

“NO”

Mill Levy Authority*

Does your organization have mill levy authority?

- ( ) Yes
- (•) No

Public Safety

Public Safety*

Does your organization provide a public service that responds to emergency calls?

- ( ) Yes
- ( ) No

- After completing the “Background Information”, “Mill/Tax Levy” and “Public Safety” questions, you will begin on the “Financial Information” section.
- There are links to the “3-Year Financial Forecast” worksheets here if you did not download them before. Select your preferred format (we recommend excel) to download. After downloading, complete and save the “3-Year Financial Forecast.” And upload by clicking the “Upload a file” button.

Financial Information

Please complete the following questions and upload all available documents for your organization; if a document is not available please explain why:

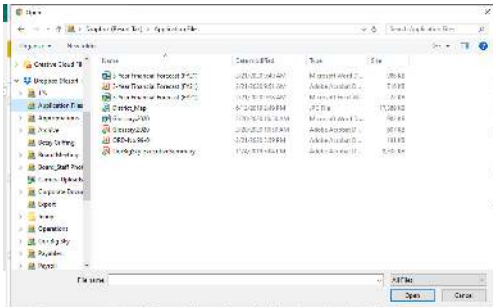
CLICK HERE TO VIEW THE GLOSSARY OF TERMS for the Organizational Budget and Reserves & Total Cash Flow tables.

3-Year Financial Forecast*

Please download the '3-Year Financial Forecast' and complete both worksheets: 'Itemized Expenses & Revenues' *AND* 'Reserves & Cash Flow.'
Use the links below to download your preferred format of these tables. (We suggest using EXCEL as formulas are set to populate totals and percentages for you.)

- EXCEL (3-Year Financial Forecast)
- WORD (3-Year Financial Forecast)
- PDF (3-Year Financial Forecast)

Upload a file [MiB allowed]



- This year you may upload financial documents that align with your organization’s fiscal year.
- If your organization does not have a requested document, please briefly explain why in the appropriate text box.

Auditor's Report

Please upload a copy of your organization's most recently completed Auditor's Report. If you are unable to provide an Auditor's Report, briefly explain why:

If you have the form requested you would not need to enter text here and you would just upload the correct file.

387 characters left of 500

Upload a file [5 MiB allowed]

Test document 123.docx [11.5KiB] Delete File

- If your organization has a Strategic/Long-Term Plan please upload ONLY THE EXECUTIVE SUMMARY/ OVERVIEW.
- If your organization does not have a Strategic/Long-Term Plan you do not need to upload anything.

Strategic Plan/Long-Term Plan*

Does your organization have a strategic plan/long-term plan? If yes please upload in the next question.

○ Yes
○ No

Strategic/Long-Term Plan Explanation

If your organization has a strategic/long-term plan please upload **ONLY** the executive summary/overview:

I.E 3 year plan, 5-year plan, etc...

Upload a file [1 MiB allowed]

Test document 123.docx [11.5KiB] Delete File

- You have completed all question sections regarding your organization. It is now time to move on to the questions regarding the specific projects/programs you are requesting funds for based on the number entered earlier.
- This year organizations may request funds for up to 8 projects/programs. We recommend grouping similar projects/programs into 1 request (i.e. group all operations into 1 project/program and individually request any capital projects/programs you may have.)
- Each "Project/Program Information" section has the same questions. Be sure to list your projects/ programs in order of highest to lowest priority throughout the application.

Project/Program 1 Information

Please complete the following section pertaining to your organization's 1st priority project/program that you are requesting funds for. There will be subsequent sections to complete for organizations with multiple projects. Please enter your projects in order of highest to lowest priority as you complete the application.

Project/Program 1*

Please enter the name for your 1st priority project/program:

Operating Expenses

- Begin filling out the questions for your top priority project.

Amount Requested | Project/Program 1*

State the amount you are requesting for project/program 1:

$ 20000

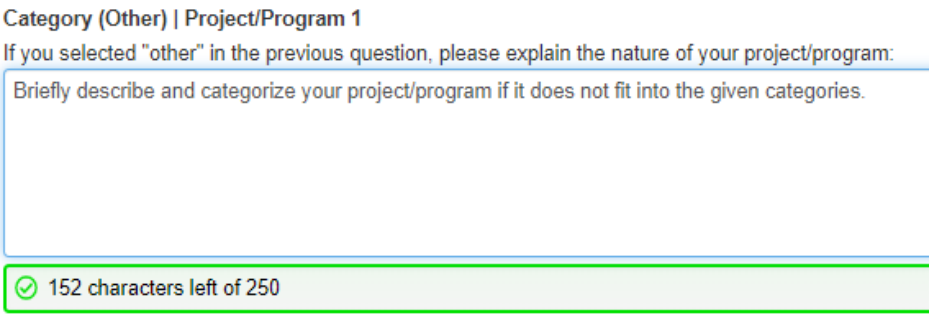
Percent of Total | Project/Program 1*

What percent of your total ask does this project/program represent?

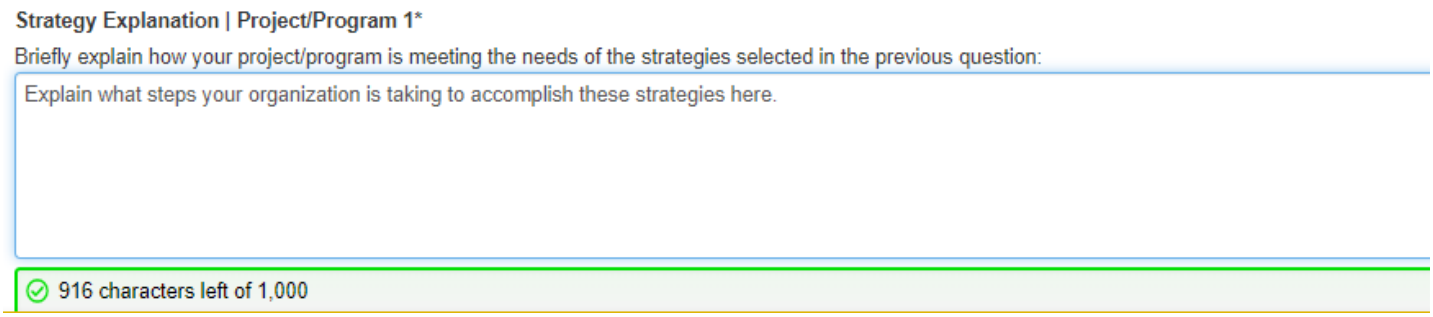
Please enter percentages as numbers only, special characters will not be accepted. I.E. 50% should be entered as 50.

20

- Select the category that best fits your project from the drop down menu (you may only select 1).
- If none of the options apply to your project select other and provide an explanation in the next question.



- Select which Strategy(s) from the Our Big Sky Community Vision and Strategy Plan, apply to your 1st project/program (you may select as many as apply to your project/program).
- Explain your selections in the next question.
- If you need to review the Strategies visit: www.ourbigskymt.com



- Select which community target segment(s) your project/program applies to.
- You may select as many as needed. If you select other please provide a brief explanation in the next question.

Community Target Segment | Project/Program 1*

Identify the community target segment(s) that applies to this project/program. Please select all that apply. You can provide more explanation if needed in the next question:

- [x] Businesses
- [ ] Children/Families
- [ ] Community Organizations
- [ ] Homeowners/HOAs
- [x] Local Workforce
- [ ] Outdoor Recreationalist
- [ ] Part-Time Residents
- [ ] Private Land Owners
- [ ] Residents in Need of Financial Assitance
- [ ] Tourist/Visitor
- [ ] Year-Round Resident
- [x] Other (please explain in next question)

More Detail Community Segment | Project/Program 1

If applicable, please provide more detail on your community target segment:

Briefly explain "Other" here I.E. Pet Owners

205 characters left of 250

- Use the same process for answering the questions regarding the schedule of your project/program.

Schedule | Project/Program 1*

What is the schedule of this project/program? Select all that apply:

- [ ] Ongoing
- [ ] Annually Recurring
- [ ] One Time
- [ ] Other (please explain in next question)

Schedule Explanation | Project/Program 1

If applicable, please provide more detail on the schedule of this program/project:

If you do not select other you may leave explanation sections blank

182 characters left of 250

- Answer the questions about Additional Operating Costs and Goals.

Additional Operating Costs | Project/Program 1*

Will the outcome of this project result in a need for additional operating and maintenance costs? If yes, please explain in the next question.

- Yes
- No

Additional Operating Costs Explanation | Project/Program 1

If applicable, please provide more detail on how you plan to fund the additional operating and maintenance costs:

Keep the following questions in mind when answering:
-When this project/program is completed will there be continued costs?
-How will these costs be funded, and for how long?

323 characters left of 500

Goals | Project/Program 1*

What are the goals of this project/program and how will they be measured?

When answering the goals question be sure to keep in mind how you will track these goals and can report on them when it comes time complete progress reports.

590 characters left of 750

- Explain community outreach in the text area.

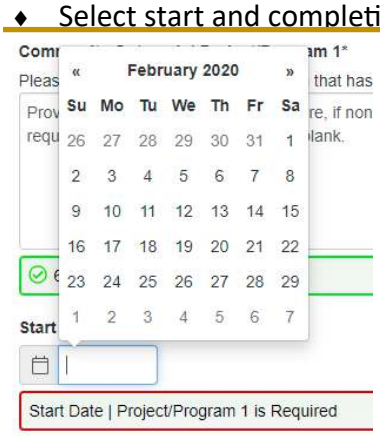
Community Outreach | Project/Program 1*

Please explain any community outreach that has led to the development of this project/program:

If none has taken place please state "none".

705 characters left of 750

- Select start and completion dates by using the calendar.



Start Date | Project/Program 1*

07/01/2020

Completion Date | Project/Program 1*

06/30/2021

- If you are applying for more than 1 project/program complete the questions for your remaining projects/ programs in order of priority. Follow the same instructions outlined on pages 17-20.

Fees & Revenue Explanation | Project/Program 1

If applicable, please explain any other fees or revenue associated with this project/program:

If you have additional fees & revenues for this project/program explain here, if no leave blank

404 characters left of 500

Project/Program 2 Information

Please complete the following section pertaining to your organization's 2nd priority project/program that you are requesting funds for. There will be subsequent sections to complete for organizations with multiple projects. Please enter your projects in order of highest to lowest priority as you complete the application.

Project/Program 2*

Please enter the name for your 2nd priority project/program:

Capital Project 1

- After you have completed all necessary project/program sections, you will be asked to provide a brief summary of your application for Resort Tax to share with the community.

Application Verification & Summary

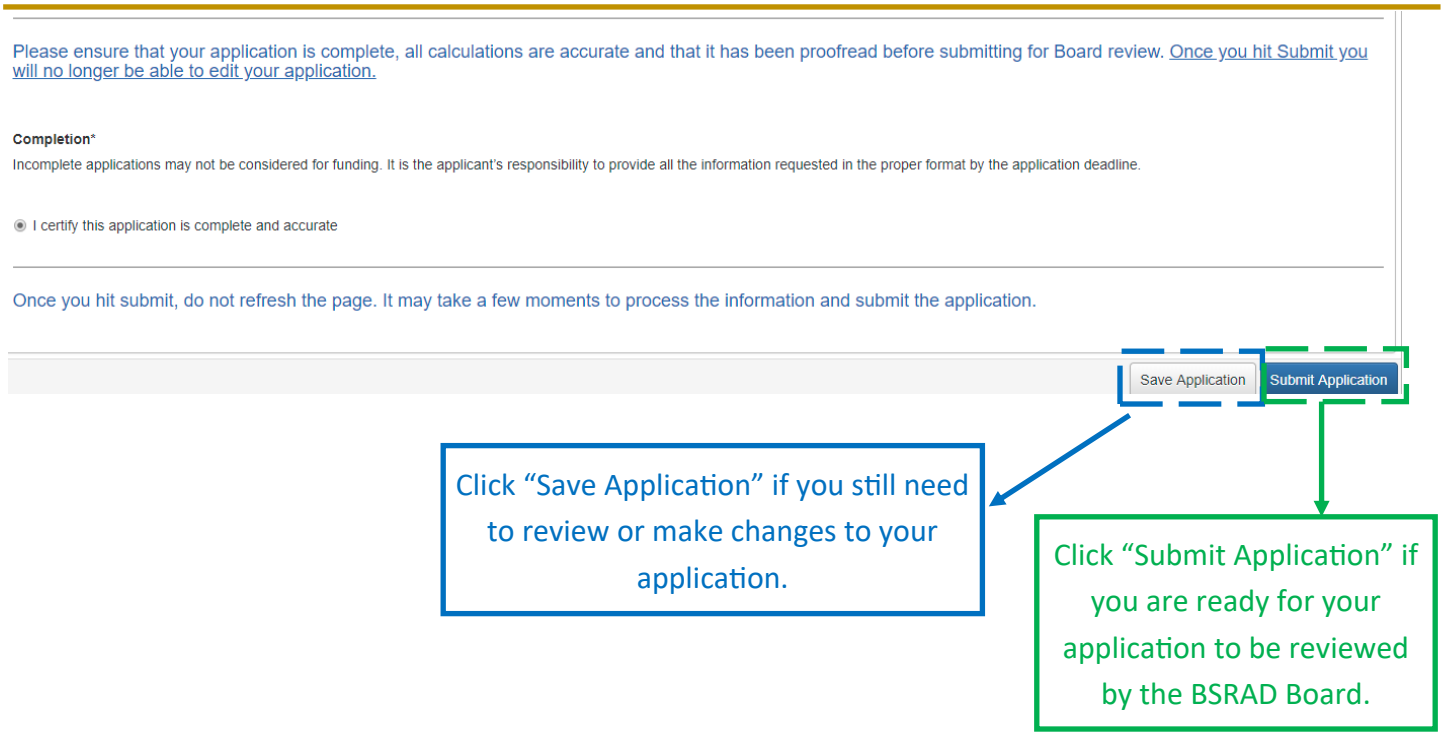
Community Messaging*

Please provide a brief description of your application for community messaging purposes:

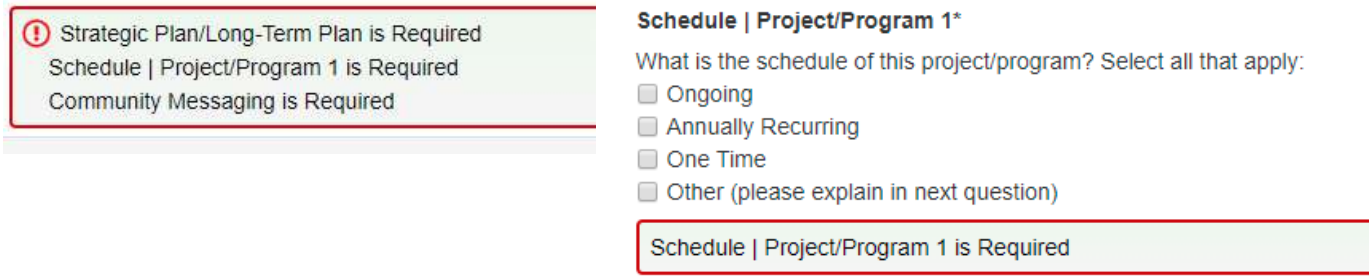
This information will be used on the Resort Tax website and flyers.

233 characters left of 300

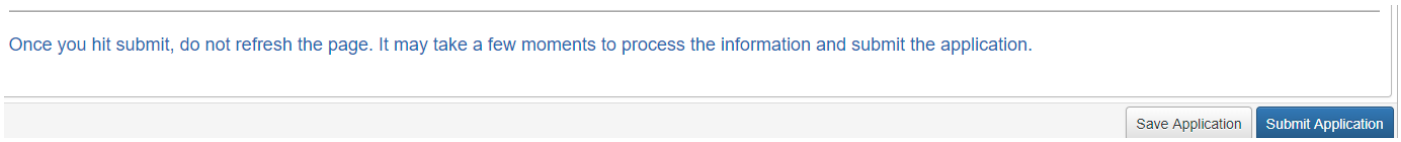
- After completing all sections and questions, please proofread your applications and check that all calculations are accurate.
- Remember you can save your application and return to it at anytime, **once you hit submit you will no longer be able to edit your application**.
- After ensuring that your application is complete and accurate verify on the completion question.



- If you select "Submit" on the application and your application is missing information, a warning message will pop up. Please complete any missing questions and upload any missing documents at this time.



- After completing any missing information, select "Submit Application."
- It may take a moment for the system to process your application so please be patient and do *not* refresh or "Submit Application" again.



- After your application has been submitted, you will receive a confirmation email.
- BSRAD staff will reach out if any additional information is needed.
- You may view your application at any time after submission. Once logged in under “Active Requests” you can click “View LOI” or “View Application.”

02/24/2020

Dear Jenny,

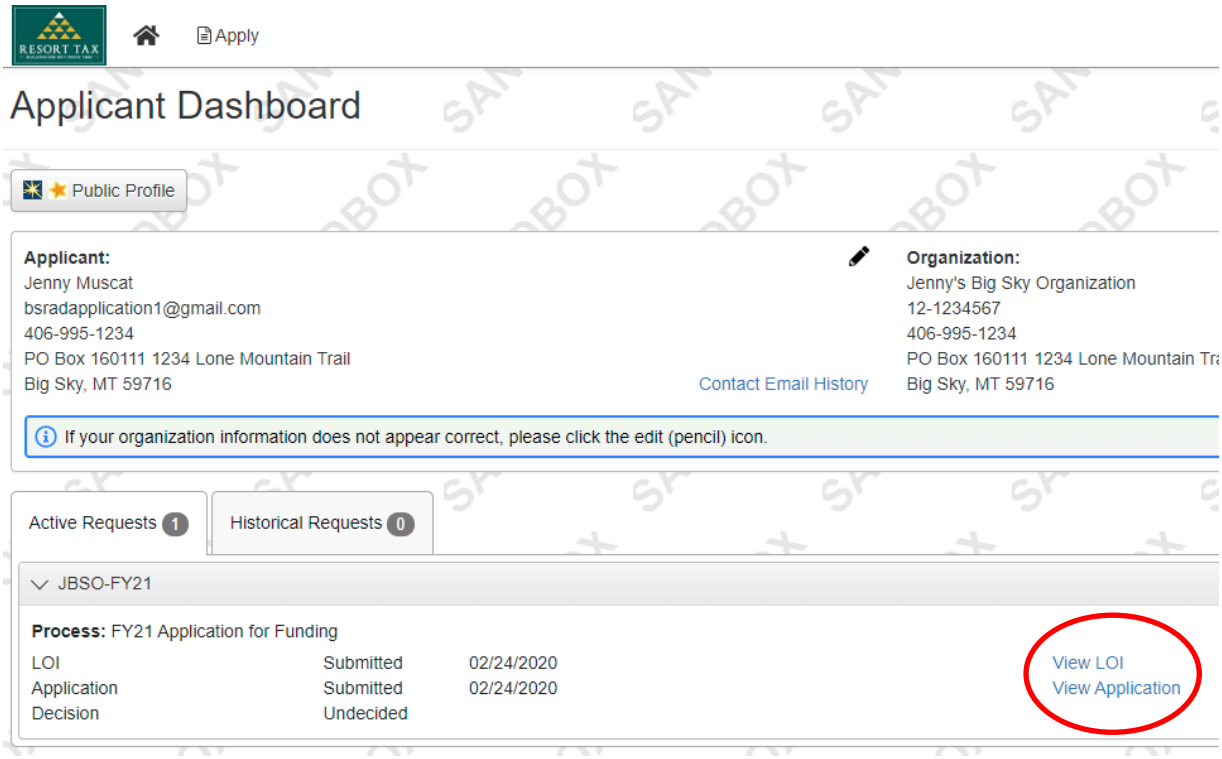
Thank you for submitting your application to Resort Tax. It was successfully received. You will be contacted if any additional information is needed.

Applications will be reviewed by the District. After your application is reviewed, you will be contacted with any additional questions in preparation for the Q&A session on Wednesday, June 3.

Important Appropriations Dates:

- Thursday, April 30, 11:59pm | Application Deadline
- Wednesday, June 3, 5:30-8:30pm | Q&A Session @ Buck's T4
- Wednesday, June 10, 5:30-8:30pm | Application Review Meeting 1 @ The Wilson Hotel
- Wednesday, June 17, 5:30-8:30pm | Application Review Meeting 2 @ The Wilson Hotel

Sincerely,
Resort Tax



- *All training materials and videos are available on our website: resorttax.org*
- *If you have any questions or require any assistance, please contact the Resort Tax Office at 406.995.3234*