Big Sky Resort Area District
FY22 Applications

- Sponsor Binder -
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<table>
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<tr>
<th><strong>Government Entities</strong></th>
<th><strong>Total 3-year Request</strong></th>
</tr>
</thead>
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<td>1-10 Big Sky Fire Department</td>
<td>BSFD</td>
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<td>11-20 Big Sky Transportation Department</td>
<td>BSTD</td>
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<tr>
<td>21-29 Gallatin County Sheriff's Office</td>
<td>GCSO</td>
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<td>30-37 Gallatin Canyon Water &amp; Sewer District</td>
<td>GCWSD</td>
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</table>

<table>
<thead>
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<th><strong>Non-Profit Entities</strong></th>
<th><strong>Total FY22 Request</strong></th>
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<tr>
<td>38-43 Big Sky Community Housing Trust</td>
<td>BSCHT</td>
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<td>44-51 Big Sky Community Organization</td>
<td>BSCO</td>
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<tr>
<td>52-57 Visit Big Sky</td>
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<td>58-64 Gallatin River Task Force</td>
<td>GRTF</td>
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<td>65-71 Big Sky Chamber of Commerce</td>
<td>BSCOC</td>
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<tr>
<td>72-78 Morningstar Learning Center</td>
<td>MLC</td>
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<tr>
<td>79-84 Arts Council of Big Sky</td>
<td>ACBS</td>
</tr>
<tr>
<td>85-91 Warren Miller Performing Arts Center</td>
<td>WMPAC</td>
</tr>
<tr>
<td>92-97 The Post Office, LLC</td>
<td>POLLC</td>
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<tr>
<td>98-103 Big Sky Discovery Academy</td>
<td>BSDA</td>
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<tr>
<td>104-110 Friends of the Big Sky Community Library</td>
<td>FOL</td>
</tr>
<tr>
<td>111-117 Big Sky Skating &amp; Hockey Association, Inc.</td>
<td>BSSEF</td>
</tr>
<tr>
<td>118-124 Gallatin Invasive Species Alliance</td>
<td>GISA</td>
</tr>
<tr>
<td>125-130 Big Sky Ski Education Foundation</td>
<td>BSSEF</td>
</tr>
<tr>
<td>131-136 Big Sky Search and Rescue</td>
<td>BSSAR</td>
</tr>
<tr>
<td>137-143 Women In Action</td>
<td>WIA</td>
</tr>
<tr>
<td>144-150 Center for Large Landscape Conservation</td>
<td>CLLC</td>
</tr>
<tr>
<td>151-156 Big Sky Community Food Bank</td>
<td>BSCFB</td>
</tr>
<tr>
<td>157-162 Gallatin Valley Snowmobile Association</td>
<td>GVSA</td>
</tr>
<tr>
<td>163-168 Big Sky Trails, Recreation, &amp; Parks District</td>
<td>BSSTRPD</td>
</tr>
<tr>
<td>169-174 The Montana Land Reliance</td>
<td>MLR</td>
</tr>
<tr>
<td>175-180 Big Sky SNO, Inc</td>
<td>SNO</td>
</tr>
</tbody>
</table>
Community Participation

- Volunteer Hours: 0
- Volunteers: 0
- Program Count: 15
- Program Participants: 200
- Event Count: 2
- Event Attendance: 100
- Number of Donors: 0
- Local Donation Amount: 0

Financial Sustainability

Revenue Distribution

<table>
<thead>
<tr>
<th>Current FY-Budgeted</th>
<th>Previous FY-Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dues, Fees, Memberships, Sales, 10%</td>
<td>Dues, Fees, Memberships, Sales, 7%</td>
</tr>
<tr>
<td>Grants, 3%</td>
<td>Grants, 3%</td>
</tr>
<tr>
<td>COVID-19 Relief*, 6%</td>
<td>COVID-19 Relief*, 13%</td>
</tr>
<tr>
<td>Other*, 1%</td>
<td>Other*, 2%</td>
</tr>
</tbody>
</table>

Other (IE Mill levies, County, State), 60% | Other (IE Mill levies, County, State), 65%

Expense Distribution

Current FY-Budgeted

- Fundraising, 0%
- Administration, 0%
- Programming, 100%

Previous FY-Actual

- Fundraising, 0%
- Administration, 0%
- Programming, 100%

Award Trends

Future Operation Requests
FY23: $918,836 FY24: $955,589

Future Capital Project Requests
FY23: $357,000 FY24: $598,000

Forecasting Accuracy

Projected FY22: $1,733,496
Variance: +$185,000 (+10.67%)

Annual Operating Budget Growth

% Variance next year: +4.38%
% Variance year after: +4.49%

Contract Compliance

Payment Requests: Accurate & Timely
Timely Responses: Responsive
Public Recognition of BSRAD: Yes
Award Orientation Attendance: Yes

Goals: The Big Sky Fire Department's (BSFD) goal for the last three years of BSRAD funding has been and continues to be, to provide the highest level of emergency services to the district and its taxpayers and visitors as possible.

Accomplishments: BSFD continues to be successful by being a progressive, innovative, and financially responsible organization that has strived to stay ahead of the pace of development.

Outcomes: We set goals and objectives every year for the organization and continue to grow to meet the demands of the community. A specific example would be the goal and demand of increasing our deployment models to be able to staff our mountain fire station more consistently.
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>25</strong></td>
<td><strong>25</strong></td>
<td></td>
</tr>
</tbody>
</table>
## SPONSOR EFFICIENCY

The District will be evaluating your organizational reliance on Resort Tax revenues and your Program Expense Ratio.

### Revenue

(Cash only, do not include In-Kind)

<table>
<thead>
<tr>
<th>Source</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Public Funding</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resort Tax</td>
<td>$916,971.00</td>
<td>$921,425.00</td>
<td>0%</td>
<td>16%</td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
<td>$3,649,067.60</td>
<td>$3,811,018.64</td>
<td>4%</td>
<td>65%</td>
</tr>
<tr>
<td><strong>Fundraising</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private Donations</td>
<td>$200.00</td>
<td>$-</td>
<td>-100%</td>
<td>0%</td>
</tr>
<tr>
<td>Corporate Donations &amp; Sponsorships</td>
<td>$-</td>
<td>$-</td>
<td>#DIV/0!</td>
<td>0%</td>
</tr>
<tr>
<td>Grants</td>
<td>$196,678.02</td>
<td>$152,384.86</td>
<td>-23%</td>
<td>3%</td>
</tr>
<tr>
<td>Events</td>
<td>$-</td>
<td>$-</td>
<td>#DIV/0!</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Direct Revenue</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dues, Fees, Memberships, Sales</td>
<td>$450,619.29</td>
<td>$575,000.00</td>
<td>28%</td>
<td>10%</td>
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<tr>
<td><strong>Other</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>COVID-19 Relief*</td>
<td>$772,453.00</td>
<td>$322,160.99</td>
<td>-58%</td>
<td>6%</td>
</tr>
<tr>
<td>Other*</td>
<td>$104,806.22</td>
<td>$45,000.00</td>
<td>-57%</td>
<td>1%</td>
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<tr>
<td><strong>Total</strong></td>
<td>$6,090,795.13</td>
<td>$5,826,989.49</td>
<td>-4%</td>
<td>100%</td>
</tr>
</tbody>
</table>

*Should total 100%*

### Expenses

<table>
<thead>
<tr>
<th>Category</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>$5,882,378.22</td>
<td>$5,525,932.89</td>
<td>-6%</td>
<td></td>
</tr>
<tr>
<td>Fundraising</td>
<td>$5,882,378.22</td>
<td>$5,525,932.89</td>
<td>-6%</td>
<td></td>
</tr>
<tr>
<td>Programming</td>
<td>$5,882,378.22</td>
<td>$5,525,932.89</td>
<td>-6%</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$5,882,378.22</td>
<td>$5,525,932.89</td>
<td>-6%</td>
<td></td>
</tr>
</tbody>
</table>

*Provide detail on other and COVID-19 Relief received, including sources and amounts*: Other Revenue Sources consist of payroll expense offset reimbursement for employment retirement system contrubutions (On-Behalf Payments 342040 $714,219.71) it also consists the Sheriffs Office Rent Revenue($6,000) Investment Income ($24,871.39) Entitlement Levy Tax ($24,136.69) and various other small utility credits and impact fees (see Budget line 36000 Miscellaneous Revenues)
<table>
<thead>
<tr>
<th></th>
<th>Current</th>
<th>Year 2</th>
<th>Year 3</th>
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</thead>
<tbody>
<tr>
<td><strong>Employees</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total # of FTE</td>
<td>28.0</td>
<td>31.0</td>
<td>32.0</td>
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<tr>
<td><strong>Core Operations</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payroll &amp; Benefits</td>
<td>$4,335,432.88</td>
<td>$4,508,850.20</td>
<td>$4,734,292.71</td>
</tr>
<tr>
<td>Rent &amp; Mortgage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Forecasted Expenses</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Operating Budget (Including Core Operations)</td>
<td>$5,225,932.89</td>
<td>$5,454,986.00</td>
<td>$5,700,000.00</td>
</tr>
<tr>
<td>Capital Expenditures</td>
<td>$300,000.00</td>
<td>$1,265,000.00</td>
<td>$300,000.00</td>
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<tr>
<td><strong>Assets</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reserves*</td>
<td>$1,179,498.00</td>
<td>$1,500,000.00</td>
<td>$2,000,000.00</td>
</tr>
</tbody>
</table>

*Purpose and intent of reserves including any restrictions*: Reserves are intended to be put towards capital savings plan for future fire construction and apparatus purchasing.
Big Sky Fire Department

Greg Megaard
PO Box 160382
650 Rainbow Trout Run
Big Sky, MT 59716-0382
admin@bigskyfire.org
O: 406-995-2100
M: 406-995-2100

Greg Megaard
PO Box 160382
650 Rainbow Trout Run
Big Sky, MT 59716-0382
gmegaard@bigskyfire.org
O: 406-995-2100
M: 406-995-2100
Application Form

**Operations-FY22-FY24 Request**

**FY22 Operations Request**
What is the amount you are requesting from Resort Tax for FY22 (7/1/21-6/30/22) operations?
$883,496.00

**FY23 Operations Request**
What is the amount you are requesting from Resort Tax for FY23 (7/1/22-6/30/23) operations?
$918,836.00

**FY24 Operations Request**
What is the amount you are requesting from Resort Tax for FY24 (7/1/23-6/30/24) operations?
$955,589.00

**Funding Impact**
How would your operation be affected if Resort Tax funding were not awarded?

The BSRAD operational support is an integral supplement to the BSFD budget. The amount is used towards operational staffing cost supplementation which then creates availability for other ancillary community-driven programs. These programs are crucial for community involvement, education, outreach, and overall community risk reduction. These programs include our code enforcement program, wildfire risk reduction, and community outreach and education programs. We have been providing more funding towards these efforts in recent years as the community continues to grow to hopefully have an impact on the safety aspect of the sustainability of the community for many years to come. If we were not awarded BSRAD funding, we would be forced to reduce these programs so that we could prioritize funding towards the critical response service that is the intention for the districts taxpayer funding.

**Budgetary Breakdown**
If applicable, 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.

$883,496 (total request) / $73,203.00 (mill value) = 12.07 Mill Levy Increase
$4,806,289,303 (DOR Market Value) / $73,203,271.00 (Taxable Value) = .015 multiplier
$100,000 (DOR value home) = $1500.00 (taxable value)
12.07(mill levy) x $1500 (taxable value) / 1000 = $18.11 tax assessment on a $100,000 DOR value home

**Category**
Please select the category that best pertains to this project.

Public Health & Safety
**Additional Information**

What additional information would you like to share with the District regarding this request?

This project funding will go towards the continued support of a high-quality, all-hazard fire district that provides the highest level of fire and EMS service in the area. Overall, the community taxpayers are the owners of the fire district and have opted to continue to pay taxes and pass various mill levies to support the district. The district resources are mainly used by non-resident 911 users and therefore the utilization of BSRAD funding to supplement taxpayer dollars for visitor and tourism impacts to the organization are extremely important to the district and its residents.

**Operations-Financial Sustainability, Reliance, Matching Funds**

The District will evaluate your request based on a sustainable funding plan and encourage diverse and matching funding sources.

**Pass-Through Funding**

Do any expenses pass-through to other Resort Tax funded projects or sponsoring organizations? If yes, please explain.

N/A

**Matching Funds Assistance**

How can the District assist in attaining matching funds?

BSRAD funding is on average 13% of our overall budget, therefore we are not reliant upon BSRAD funding. BSRAD funding is just a small portion of the overall investment made by the community taxpayers to fund our organization and is done so to offset the impact of over 60% of visitor utilization of the 911 system.

**Operations-Quality of Proposal**

The District will evaluate the quality of your proposal based on a well-articulated method for achieving goals.

**Operational Goals and Outcomes**

What are the goals, outcomes, or deliverables of this request?

The goal of our project is to continue to perform up to our vision and motto for this department of "Only Our Best Will Do". This motto best describes the level of service and the commitment this organization has to the community. We strive to continue to provide this level of service and to continue to improve our ability to be adaptive as the risks and needs of the community change. The continued funding will more specifically go to support staffing needs to meet the community growth and demand for service. The outcomes and deliverables for this goal will be measurable by quantitative data. We have established benchmarks and strategic plans in place to improve benchmarks on various levels. The benchmarks will be an easily identifiable measure of success for funding utilization.

**Metrics**

Please list the metrics you will use to measure success.
Our metrics rely heavily on data. We pride ourselves on being a department that is driven by data. For example, we utilize varying seasonal call location data to strategically move resources throughout the community depending on risk to the area based upon historical data and trends. This same data is used similar to the outcome/deliverable section above to establish benchmarks for a response within the district. This benchmark data is very specific to call type, response times, and a number of personnel and apparatus to the scene. If we are able to meet these benchmarks that are in line with national standards then operationally, it is a quantitative metric to measure success. Metrics for success for other programs that we offer are more conventional and typically just compile running totals of items such as outreach and education, inspections, plan reviews, and risk reduction activities.

**Operations-Articulates Long-Term Vision**

**Operational Vision**

What is the long-term vision of your operation?

The long-term operational vision for the BSFD is to continue to grow with the community and to meet the demands of the current climate while planning for the future in a manner that is best suited for the residents and its many visitors. We plan to be progressive and innovative for future growth and intend to do so in a fiscally prudent manner that is focused on data-driven decision-making and planning utilizing community input and transparency.

**Supplemental Planning Efforts**

Are there any long-term planning documents (e.g. Strategic Plan, Capital Improvement Plan, Master Plan) that directly relate to this request? If so, please list them here.

We currently have numerous supplemental planning documents in place. These include: BigSky Fire Department Master Plan (2019), Big Sky Standards of Cover (2019), Big Sky Fire Community Risk Assessment (2019), Conventional Capital Improvement Plan (2021)

**Operations-Consistent With Community Strategy**

The District will evaluate your request based on its alignment with the strategies outlined in the Our Big Sky Community Plan.

Our Big Sky Strategies

Please select which strategies outlined in the Our Big Sky Community Vision and Strategy this project/program is working to achieve. Select all that apply.

- Support high-quality community & emergency services
- Embrace Big Sky's DNA as a destination, born out of a visitor economy
- Protect wildlife habitat & natural resources
- Work to become a sustainable & resilient community

Strategy Explanation

Briefly explain how your outcomes meet the needs of the strategies selected. If applicable, please explain any community needs or priorities that this request is assisting with that are not outlined in the Our Big Sky Plan.
BSFD has many impacts that are affected by our ability to effectively and efficiently respond to incidents. The community sees the direct effects of our ability to respond but there are many tertiary benefits that impact numerous other strategies identified in the Vision Big Sky Document. Operational support dollars directly provide high-quality community and emergency services. Indirectly, our operational abilities protect habitat and natural resources through our ability to respond to wildland fire and other all-hazard incidents. Our ability to protect our community and provide education and outreach directly impact the sustainability and resiliency of our community as well.

Operations-Population Served
The District will evaluate this request based on its ability to serve segments that have a demonstrated need.

Target Segment*
Identify the community target segment(s) that apply. Please select all that apply.

- Businesses (private and public)
- Children/Families
- Outdoor Recreationalist
- Part-Time Residents
- Property Owners/HOAs
- Residents in Need of Financial Assistance
- Tourist/Visitor
- Wildlife and Natural Environment
- Year-Round Residents

People Served Annually*
How many people do you serve on an annual basis?
20000

Measuring People Served*
How do you plan to track or measure the number of people served?

Quantitatively it is easy to assign a number to the people served as a number of 911 calls we go on. Unfortunately, that number does not capture a fraction of the actual thousands of phone calls, education and outreach events, station tours, personal conversations, public assists, meetings and other various items that would fall into the "people served" category. The number of people served in the question above is a conservative estimate when in actuality it is probably much higher.

Locals Served*
Of the number of people served provided above, how many live within the District boundaries?
3500
**Operations-Partnerships**

The District will evaluate your request based on its ability to demonstrate cross-organizational collaboration. 

*Partner: An organization providing time, energy, talent, or funding with the intent of collaboratively achieving project goals.*

**Partner List**

Please list your partners and briefly explain their roles and responsibilities.

We work with multiple cooperators in our area through mutual aid requests and shared response areas. We will continue to leverage these relationships in every way to provide funding, higher levels of service, or expertise to the community at every opportunity. We work with a broad list of partners in our efforts such as Gallatin County, Madison County, State of Montana, USFS, and many other local public safety entities.

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**Capital**

**Capital Requests**

Do you plan to request funding for capital projects in FY22, FY23, or FY24?

Yes

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**Capital Projects**

**FY22 Capital Project Request**

If you are not requesting enter 0.

$1,035,000.00

**FY23 Capital Project Request**

If you are not requesting enter 0.

$357,000.00

**FY24 Capital Project Request**

If you are not requesting enter 0.

$598,000.00

**FY23 & FY24 Capital Projects**

Please provide a brief description of your upcoming projects (FY23/24).

A detailed project application will be available during those cycles.

FY23: Replacement of 32 of our Self-Contained Breathing Apparatus devices and masks
FY24: Replacement of a 1997 Water Tender and replacement of cardiac monitors
**BIG SKY TRANSPORTATION DISTRICT (BSTD)**

$850,000 (9.21% of total FY22 requests)

### Community Participation
- Volunteer Hours: 140
- Volunteers: 5
- Program Count: 1
- Program Participants: 800

### Financial Sustainability

#### Revenue Distribution

- Dues, Fees, Memberships, Sales, 16%
- Corporate Donations & Sponsorships, 1%
- Resort Tax, 18%
- Other (IE Mill levies, County, State), 65%

#### Expense Distribution

- Administration, 13%
- Programming, 88%
- Fundraising, 0%

### Award Trends

![Graph showing award trends]

### Future Operation Requests

**FY23:** $950,000  
**FY24:** $975,000

### Future Capital Project Requests

**FY23:** $250,000  
**FY24:** $250,000

### Forecasting Accuracy

- Projected FY22: $850,000
- Variance: NONE

### Track Record

**Goals:** The goals of the Skyline project over the last three years were to continue to operate the transit system, to grow ridership, and to expand service when possible. These goals also include procuring new vehicles whenever possible to ensure safe and efficient operations.

**Accomplishments:** Those goals were achieved, except to the extent that the COVID-19 pandemic impacted operations.

**Outcomes:** Through our continued service, we were able to provide mobility for those within Big Sky, and those traveling between Big Sky and the greater Bozeman area. We provided transportation options for residents of Big Sky, visitors within Big Sky, as well as workers and visitors who were traveling between the greater Bozeman area and Big Sky.
<table>
<thead>
<tr>
<th>Criteria</th>
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<th>Score</th>
<th>Notes</th>
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<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>10</td>
<td>Sponsor did great job of leveraging COVID-19 funding</td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td>Proactive communication</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>25</strong></td>
<td><strong>25</strong></td>
<td></td>
</tr>
</tbody>
</table>
## SPONSOR EFFICIENCY
The District will be evaluating your organizational reliance on Resort Tax revenues and your Program Expense Ratio.

### Revenue
(Cash only, do not include In-Kind)

<table>
<thead>
<tr>
<th>Revenue</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Public Funding</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resort Tax</td>
<td>$750,000.00</td>
<td>$295,000.00</td>
<td>-61%</td>
<td>18%</td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
<td>$1,245,551.00</td>
<td>$1,079,690.00</td>
<td>-13%</td>
<td>65%</td>
</tr>
<tr>
<td><strong>Fundraising</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private Donations</td>
<td>$</td>
<td>$</td>
<td>#DIV/0! 0%</td>
<td></td>
</tr>
<tr>
<td>Corporate Donations &amp; Sponsorships</td>
<td>$31,940.00</td>
<td>$24,202.00</td>
<td>-24%</td>
<td>1%</td>
</tr>
<tr>
<td>Grants</td>
<td>$</td>
<td>$</td>
<td>#DIV/0! 0%</td>
<td></td>
</tr>
<tr>
<td>Events</td>
<td>$</td>
<td>$</td>
<td>#DIV/0! 0%</td>
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</tr>
<tr>
<td><strong>Direct Revenue</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dues, Fees, Membership, Sales</td>
<td>$278,450.00</td>
<td>$262,825.00</td>
<td>-6%</td>
<td>16%</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>COVID-19 Relief*</td>
<td>$</td>
<td>$</td>
<td>#DIV/0! 0%</td>
<td></td>
</tr>
<tr>
<td>Other*</td>
<td>$</td>
<td>$</td>
<td>#DIV/0! 0%</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$2,805,941.00</td>
<td>$1,661,717.00</td>
<td>-28%</td>
<td>100%</td>
</tr>
</tbody>
</table>

*Should total 100%

### Expenses

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Current FY</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>$203,190.00</td>
<td>$299,300.00</td>
<td>47%</td>
</tr>
<tr>
<td>Fundraising</td>
<td>$</td>
<td>$</td>
<td>#DIV/0! 0%</td>
</tr>
<tr>
<td>Programming</td>
<td>$1,456,914.00</td>
<td>$1,947,108.00</td>
<td>34%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$1,660,104.00</td>
<td>$2,246,408.00</td>
<td>33%</td>
</tr>
</tbody>
</table>

*Provide detail on other and COVID-19 Relief received, including sources and amounts*.

### 3-YEAR GROWTH FORECAST
(Include all organization projects and programs, not only those requesting resort tax funding)

<table>
<thead>
<tr>
<th>Employees</th>
<th>Year 1 (7/1/20 - 6/30/21)</th>
<th>Year 2 (7/1/21 - 6/30/22)</th>
<th>Year 3 (7/1/22 - 6/30/23)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Operations</td>
<td>$1,238,500.00</td>
<td>$1,379,000.00</td>
<td>$1,498,000.00</td>
</tr>
<tr>
<td>Payroll &amp; Benefits</td>
<td>$27,200.00</td>
<td>$12,000.00</td>
<td>$18,000.00</td>
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<tr>
<td>Rent &amp; Mortgage</td>
<td>$51,850.00</td>
<td>$65,000.00</td>
<td>$113,000.00</td>
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<tr>
<td><strong>Total Forecasted Expenses</strong></td>
<td>$2,246,408.00</td>
<td>$2,353,400.00</td>
<td>$2,558,400.00</td>
</tr>
<tr>
<td><strong>Assets</strong></td>
<td>$985,015.00</td>
<td>$800,000.00</td>
<td>$550,000.00</td>
</tr>
</tbody>
</table>

*Provide detail on other and COVID-19 Relief received, including sources and amounts*.

### Notes
- Public Funding:
  - Resort Tax: 750,000.00 $ (51% decrease from previous year)
  - Other (IE Mill levies, County, State): 1,245,551.00 $ (23% decrease from previous year)
  - Private Donations: 0 $ (No data available)
  - Corporate Donations & Sponsorships: 31,940.00 $ (23% decrease from previous year)
  - Grants: 0 $ (No data available)
  - Events: 0 $ (No data available)
  - Dues, Fees, Membership, Sales: 278,450.00 $ (6% decrease from previous year)

- Fundraising:
  - Private Donations: 0 $ (No data available)
  - Corporate Donations & Sponsorships: 31,940.00 $ (23% decrease from previous year)
  - Grants: 0 $ (No data available)
  - Events: 0 $ (No data available)

- Direct Revenue:
  - Dues, Fees, Membership, Sales: 278,450.00 $ (6% decrease from previous year)

- Other:
  - COVID-19 Relief: 0 $ (No data available)
  - Other: 0 $ (No data available)

- Expenses:
  - Administration: 203,190.00 $ (47% increase from previous year)
  - Fundraising: 0 $ (No data available)
  - Programming: 1,456,914.00 $ (34% increase from previous year)

- Core Operations:
  - Payroll & Benefits: 1,238,500.00 $ (17% increase from previous year)
  - Rent & Mortgage: 27,200.00 $ (35% increase from previous year)

- Total Forecasted Expenses: 2,246,408.00 $ (33% increase from previous year)

- Assets:
  - Reserves: 985,015.00 $ (33% increase from previous year)

*Provide detail on other and COVID-19 Relief received, including sources and amounts*.

**Purpose and intent of reserves including any restrictions**: The purpose of the reserves, which are restricted to transit related expenses, are to ensure a cushion against any unforeseen expenses in a given operating year. Due to the CARES Act funding that the Transportation District received in FY20 and FY21, the reserves have grown beyond what is needed, but will be spent down over FY22-24 to a normal/required level.
BSTD-FY22-FY24

Government FY22-FY24

Big Sky Transportation District

TBD TBD
PO Box 161104
Big Sky, MT 59716
info@skylinebus.com
O: 406-995-6287
M: 406-995-6287

David Kack

PO Box 161104
PO Box 161104
Big Sky, MT 59716
info@skylinebus.com
O: 406-995-6287
M: 406-994-7526
Application Form

Operations-FY22-FY24 Request

FY22 Operations Request*
What is the amount you are requesting from Resort Tax for FY22 (7/1/21-6/30/22) operations?
$850,000.00

FY23 Operations Request*
What is the amount you are requesting from Resort Tax for FY23 (7/1/22-6/30/23) operations?
$950,000.00

FY24 Operations Request*
What is the amount you are requesting from Resort Tax for FY24 (7/1/23-6/30/24) operations?
$975,000.00

Funding Impact*
How would your operation be affected if Resort Tax funding were not awarded?

The funding from the Big Sky Resort Area District makes up about 39 percent of all revenue for the Transportation District. Therefore, if funding were not awarded, the Transportation District would need to cut approximately 40 percent of its services to account for the loss of revenue. Given that the Big Sky community is growing, and there is an increasing demand for transportation services, a reduction in funding from the Resort Area District would impact not only Skyline’s service, but the entire community.

Budgetary Breakdown
If applicable, 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.

At $36,000 per mill, a total of 23.6 mills would need to be levied to obtain $850,000, 27.1 mills to replace $975,000. The tax burden per $100,000 of market value (appraised value) would be $31.86 per year (for $850,000 of revenue) or 36.59 per year to obtain $975,000 in funds.

To put this into perspective, there are homes in Ramshorn with appraised values around $500,000. These homes would pay $159.30 per year to obtain $850,000 in funds, or $182.93 to obtain $975,000 of annual support.

It should be noted that if the Transportation District is able to expand to the same boundaries as the Resort Tax District, a mill would have a value of approximately $72,000, reducing the number of mills needed to 11.8 or 13.5 mills, respectively. That would mean a cost of $79.65/year or $91.13/year, for $850,000 or $975,000, respectively, for a house with a $500,000 value.
Category*
Please select the category that best pertains to this project.

Community Development & Social Services

Additional Information*
What additional information would you like to share with the District regarding this request?

As noted elsewhere in this request, transportation (mobility) is a “means to an end.” In general, transportation is what allows us to live the kind of life we want. Whether we are going to work, to school, to buy groceries or other goods, or just to go skiing, snowboarding, or rafting, we need transportation to get us where we want to go. Therefore, we need a robust transportation system to allow individuals, families, and the community to prosper.

Most of the strategies/categories noted are not possible without a good transportation system. Businesses cannot survive unless both employees and customers can access the location. Resources can be better protected if fewer people drive, and more people use public transportation services.

Operations-Financial Sustainability, Reliance, Matching Funds
The District will evaluate your request based on a sustainable funding plan and encourage diverse and matching funding sources.

Pass-Through Funding*
Do any expenses pass-through to other Resort Tax funded projects or sponsoring organizations? If yes, please explain.

No.

Matching Funds Assistance*
How can the District assist in attaining matching funds?

BSRAD can assist by communicating with both Gallatin and Madison Counties that they need to provide financial support to the Transportation District, and if possible, to establish agreements with the Counties like those regarding law enforcement, for the Transportation District.

Operations-Quality of Proposal
The District will evaluate the quality of your proposal based on a well-articulated method for achieving goals.

Operational Goals and Outcomes*
What are the goals, outcomes, or deliverables of this request?

The operational goals and outcomes/deliverables of this request are to expand the Skyline service to the degree possible given the funding, drivers, and vehicles available, based on the needs of the community. This includes expanding services within Big Sky and between Big Sky and Bozeman, during both the winter and summer seasons. Over this three-year period (FY22-24), Skyline will add one bus to the local service during
the winter season (FY22), then in FY23 we will add in another bus to the local service during the winter and summer season, as well as adding another roundtrip to the Link Express service during the winter season, and then in FY24, add in one more Link Express roundtrip during the winter season.

The outcome will be expanded service that will meet the needs of the community. The expanded service should increase ridership, as people will have a service that gets them where they want to go, when they want to go.

**Metrics***
Please list the metrics you will use to measure success.

The metrics we will use to measure success include implementation of the new service noted herein, along with ridership counts. Satisfaction with the new service (community and rider comments) will be another metric that will be measured.

**Operations-Articulates Long-Term Vision**

**Operational Vision***
What is the long-term vision of your operation?

The long-term vision of the Big Sky Transportation District is to provide a multitude of transportation services that meet the needs of the residents and visitors of Big Sky, as well as the needs of those working in Big Sky. In addition to the fixed route, demand-response and vanpool services already offered, future service may include microtransit and even car-sharing services, so all mobility needs of the community are met.

**Supplemental Planning Efforts***
Are there any long-term planning documents (e.g. Strategic Plan, Capital Improvement Plan, Master Plan) that directly relate to this request? If so, please list them here.

In addition to the annual Coordination Plan that is submitted to the Montana Department of Transportation, a FY19-FY24 long-term plan was drafted that discussed the potential for the expansion of services. Most of the planning efforts are tied to the growth in the Big Sky community, as well as the Transportation District’s ability to obtain enough vehicles and funding to operate the necessary services.

**Operations-Consistent With Community Strategy**

The District will evaluate your request based on its alignment with the strategies outlined in the Our Big Sky Community Plan.

**Our Big Sky Strategies***
Please select which strategies outlined in the Our Big Sky Community Vision and Strategy this project/program is working to achieve. Select all that apply.

- Improve and maintain infrastructure
- Support high-quality community & emergency services
- Support & enhance social services
- Support independently-owned small businesses
Provide transparency/engagement & governance options
Embrace Big Sky’s DNA as a destination, born out of a visitor economy
Expand & enhance pathways & trail connections
Provide all-season recreational opportunities
Increase transportation options to serve recreation & mobility
Preserve & enhance public access to public lands & waterways
Protect wildlife habitat & natural resources
Protect & enhance our water resources
Work to become a sustainable & resilient community

**Strategy Explanation***
Briefly explain how your outcomes meet the needs of the strategies selected. If applicable, please explain any community needs or priorities that this request is assisting with that are not outlined in the Our Big Sky Plan.

Transportation (mobility) is a “means to an end.” In general, transportation is what allows us to live the kind of life we want. Whether we are going to work, to school, to buy groceries or other goods, or just to go skiing, snowboarding, or rafting, we need transportation to get us where we want to go. Therefore, we need a robust transportation system to allow individuals, families, and the community to prosper.

Most of the strategies noted are enhanced through a good transportation system. Businesses cannot survive unless both employees and customers can access the location. Wildlife, and natural and water resources can be better protected if fewer people drive, and more people use public transportation services.

In short, if the transportation system in Big Sky (and between Big Sky and Bozeman) fails, then the entire community will fail. Very few of the strategies noted will be able to be achieved without a functioning transportation system.

**Operations-Population Served**
The District will evaluate this request based on its ability to serve segments that have a demonstrated need.

**Target Segment***
Identify the community target segment(s) that apply. Please select all that apply.
- Businesses (private and public)
- Children/Families
- Local Workforce
- Non-Profits
- Outdoor Recreationalist
- Part-Time Residents
- Property Owners/HOAs
- Residents in Need of Financial Assistance
- Tourist/Visitor
- Year-Round Residents

**People Served Annually***
How many people do you serve on an annual basis?
850
Measuring People Served
How do you plan to track or measure the number of people served?

We measure the number of “rides” that we provide, which is also known as the number of “unlinked passenger trips.” When someone steps on one of our vehicles and we transport them, that is a “ride.” We have many people who use our services on a regular (five to seven days per week) basis, while others may use our services for only a few rides/trips. We therefore estimate how many unique individuals use our services based on the number of rides provided. Skyline’s service are open to all people.

Locals Served
Of the number of people served provided above, how many live within the District boundaries?

100

Operations-Partnerships
The District will evaluate your request based on its ability to demonstrate cross-organizational collaboration.
Partner: An organization providing time, energy, talent, or funding with the intent of collaboratively achieving project goals.

Partner List
Please list your partners and briefly explain their roles and responsibilities.

MDT provides oversight of BSTD and is the largest source of funds, while BSRAD provides the largest portion of local funds. Karst Stage helps the District operate Skyline. The Big Sky Chamber provides input/support, while Big Sky Resort, Moonlight Basin, Spanish Peaks Resort, and the Yellowstone Club all purchase bus passes for their employees and provide input on the schedules. Gallatin & Madison Counties provide financial support.

Capital
Capital Requests
Do you plan to request funding for capital projects in FY22, FY23, or FY24?

Yes

Capital Projects
FY22 Capital Project Request
If you are not requesting enter 0.

$0.00
FY23 Capital Project Request*
If you are not requesting enter 0.
$250,000.00

FY24 Capital Project Request*
If you are not requesting enter 0.
$250,000.00

FY23 & FY24 Capital Projects
Please provide a brief description of your upcoming projects (FY23/24).
A detailed project application will be available during those cycles.

It is possible that BSTD will ask for funding to help obtain battery-electric buses for use within Big Sky. This is an unknown at this time, and would depend upon Federal funds being available to cover a significant portion of these vehicles. These are highly competitive grants, so BSTD may not be awarded these funds. BSTD will work with BSRAD to keep them informed if capital requests for FY 23 & FY24 are a possibility.
GALLATIN COUNTY SHERIFF’S OFFICE (GCSO)
$323,378 (3.50% of FY22 total requests)

Financial Sustainability

Revenue Distribution
Current FY-Budgeted
- Resort Tax, 33%
- Other (IE Mill levies, County, State), 67%

Previous FY-Actual
- Resort Tax, 33%
- Other (IE Mill levies, County, State), 67%

Expense Distribution
Current FY-Budgeted
- Programming, 100%

Previous FY-Actual
- Programming, 100%

Award Trends

Future Operations Requests
FY23: $331,299 FY24: $345,304
Capital Projects: Potential future project request for new office in Big Sky, details TBD

Forecasting Accuracy
Projected FY22: $322,877
Variance: $501 (+.16%)

Annual Operating Budget Growth
% Variance next year: +3.57%
% Variance year after: +5.27%

Community Participation
- Volunteer Hours: 0
- Volunteers: 0
- Program Count: 0
- Program Participants: 0
- Event Count: 0
- Event Attendance: 0
- Number of Donors: 0
- Local Donation Amount: 0

Contract Compliance
Payment Requests: Timely & Accurate
Timely Responses: Has improved in last few months
Public Recognition of BSRAD: Unknown
Award Orientation Attendance: Yes

Track Record
Goals:
The Goals of the Gallatin County Sheriff’s Office are to continue to provide first class law enforcement and public safety services.

Accomplishments:
We are proud of the work we have done in the Big Sky area and in Gallatin County as a whole.

Outcomes:
We have continued to have a stable and interactive presence in the Big Sky Community.
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
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</thead>
<tbody>
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<td>Community Participation</td>
<td>Collaboration</td>
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<td>5</td>
<td></td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>10</td>
<td></td>
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<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
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<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>25</strong></td>
<td><strong>25</strong></td>
<td></td>
</tr>
</tbody>
</table>
### SPONSOR EFFICIENCY

The District will be evaluating your organizational reliance on Resort Tax revenues and your Program Expense Ratio.

**Previous Fiscal Year:** Recently completed Fiscal Year

**Current Fiscal Year:** Fiscal Year as of 4/15/21

<table>
<thead>
<tr>
<th>Revenue (Cash only, do not include In-Kind)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Public Funding</strong></td>
</tr>
<tr>
<td>Resort Tax</td>
</tr>
<tr>
<td>Previous FY-Actual</td>
</tr>
<tr>
<td>Current FY-Budgeted</td>
</tr>
<tr>
<td>% Change</td>
</tr>
<tr>
<td>% of total Revenue</td>
</tr>
<tr>
<td>Revenue</td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
</tr>
<tr>
<td>Previous FY-Actual</td>
</tr>
<tr>
<td>Current FY-Budgeted</td>
</tr>
<tr>
<td>% Change</td>
</tr>
<tr>
<td>% of total Revenue</td>
</tr>
<tr>
<td>Revenue</td>
</tr>
</tbody>
</table>

| Fundraising                               |
| Private Donations                         |
| Previous FY-Actual                         | $-          |
| Current FY-Budgeted                        | $-          |
| % Change                                  | #DIV/0! 0%  |
| % of total Revenue                         | Current FY   |
| Revenue                                   | 0%          |
| Corporate Donations & Sponsorships        |
| Previous FY-Actual                         | $-          |
| Current FY-Budgeted                        | $-          |
| % Change                                  | #DIV/0! 0%  |
| % of total Revenue                         | Current FY   |
| Revenue                                   | 0%          |
| Grants                                    |
| Previous FY-Actual                         | $-          |
| Current FY-Budgeted                        | $-          |
| % Change                                  | #DIV/0! 0%  |
| % of total Revenue                         | Current FY   |
| Revenue                                   | 0%          |
| Events                                    |
| Previous FY-Actual                         | $-          |
| Current FY-Budgeted                        | $-          |
| % Change                                  | #DIV/0! 0%  |
| % of total Revenue                         | Current FY   |
| Revenue                                   | 0%          |

| Direct Revenue                            |
| Dues, Fees, Membership, Sales             |
| Previous FY-Actual                         | $-          |
| Current FY-Budgeted                        | $-          |
| % Change                                  | #DIV/0! 0%  |
| % of total Revenue                         | Current FY   |
| Revenue                                   | 0%          |
| Other                                     |
| COVID-19 Relief*                          |
| Previous FY-Actual                         | $-          |
| Current FY-Budgeted                        | $-          |
| % Change                                  | #DIV/0! 0%  |
| % of total Revenue                         | Current FY   |
| Revenue                                   | 0%          |
| Other*                                    |
| Previous FY-Actual                         | $-          |
| Current FY-Budgeted                        | $-          |
| % Change                                  | #DIV/0! 0%  |
| % of total Revenue                         | Current FY   |
| Revenue                                   | 0%          |

| Total                                      |
|                                             |
| Revenue                                   |
| Previous FY-Actual                         | $900,462.00 |
| Current FY-Budgeted                        | $933,981.00 |
| % Change                                  | 4% 100%     |
| % of total Revenue                         | Current FY   |
| Revenue                                   | 100%        |

Note: *Should total 100%*

| Expenses                                   |
| Administration                             |
| Previous FY-Actual                         | $-          |
| Current FY-Budgeted                        | $-          |
| % Change                                  | #DIV/0! 0%  |
| % of total Revenue                         | Current FY   |
| Revenue                                   | 0%          |
| Fundraising                                |
| Previous FY-Actual                         | $-          |
| Current FY-Budgeted                        | $-          |
| % Change                                  | #DIV/0! 0%  |
| % of total Revenue                         | Current FY   |
| Revenue                                   | 0%          |
| Programming                                |
| Previous FY-Actual                         | $-          |
| Current FY-Budgeted                        | $-          |
| % Change                                  | #DIV/0! 0%  |
| % of total Revenue                         | Current FY   |
| Revenue                                   | 0%          |

| TOTAL                                      |
|                                             |
| Expenses                                   |
| Previous FY-Actual                         | $-          |
| Current FY-Budgeted                        | $-          |
| % Change                                  | #DIV/0! 0%  |
| % of total Revenue                         | Current FY   |
| Revenue                                   | 0%          |

*Provide detail on other and COVID-19 Relief received, including sources and amounts*:

--

### 3-YEAR GROWTH FORECAST

(Include all organization projects and programs, not only those requesting resort tax funding)

<table>
<thead>
<tr>
<th>Employees</th>
<th>Core Operations</th>
<th>Payroll &amp; Benefits</th>
<th>$779,415.00</th>
<th>$796,916.00</th>
<th>$832,374.00</th>
<th>Rent &amp; Mortgage</th>
<th>$6,000.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td>Year 2</td>
<td>Year 3</td>
<td><em>please enter your fiscal year dates</em></td>
<td><em>please enter your fiscal year dates</em></td>
<td><em>please enter your fiscal year dates</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total # of FTE</td>
<td>6.0</td>
<td>6.0</td>
<td>6.0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Forecasted Expenses</th>
<th>Total Operating Budget (Including Core Operations)</th>
<th>$981,185.00</th>
<th>$1,016,217.00</th>
<th>$1,069,728.00</th>
<th>Capital Expenditures</th>
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</thead>
<tbody>
<tr>
<td>Assets</td>
<td>Reserves*</td>
<td>$</td>
<td>-</td>
<td>$</td>
<td>-</td>
</tr>
</tbody>
</table>

*Purpose and intent of reserves including any restrictions*: The only reserves are set aside when a patrol vehicle is not purchased during the current FY and need to be "rolled" into the next FY due to vehicle shortages.
GCSO-BS/CDP FY22-24

Government FY22-FY24

Gallatin County Sheriff's Office
Brian Gootkin
615 S. 16th Ave.
615 S. 16th Ave.
Bozeman, MT 59715

O: 406-582-2125
M: 406-582-2125

Mark Woodard
615 S. 16th Ave.
615 S. 16th Ave.
Bozeman, MT 597156
mark.woodard@gallatin.mt.gov

O: 406-582-3645
M: 406-582-2125
Application Form

**Operations-FY22-FY24 Request**

**FY22 Operations Request**
What is the amount you are requesting from Resort Tax for FY22 (7/1/21-6/30/22) operations?

$323,378.00

**FY23 Operations Request**
What is the amount you are requesting from Resort Tax for FY23 (7/1/22-6/30/23) operations?

$331,299.00

**FY24 Operations Request**
What is the amount you are requesting from Resort Tax for FY24 (7/1/23-6/30/24) operations?

$345,304.00

**Funding Impact**
How would your operation be affected if Resort Tax funding were not awarded?

We would possibly need to revisit staffing levels for the Big Sky/Canyon Division Patrol.

**Budgetary Breakdown**
If applicable, 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.

This question is difficult to answer because of the possible changes in the contract from Madison County's end. Depending on whether or not they want to fund half of the project, continue to fund 1/3rd, or decrease funding as a result of this change there could be a number of possible tax implications in one or both counties.

**Category**
Please select the category that best pertains to this project.

- Public Health & Safety

**Additional Information**
What additional information would you like to share with the District regarding this request?

Gallatin County Sheriff's Office is driven to continue to partner with Madison County and BSRAD to ensure exceptional Law Enforcement Services can be provided to all citizens and visitors to the Big Sky area.
**Operations-Financial Sustainability, Reliance, Matching Funds**

The District will evaluate your request based on a sustainable funding plan and encourage diverse and matching funding sources.

**Pass-Through Funding**
Do any expenses pass-through to other Resort Tax funded projects or sponsoring organizations? If yes, please explain.

N/A

**Matching Funds Assistance**
How can the District assist in attaining matching funds?

The Sheriff’s Office will continue to work with Gallatin County commissioners and Madison County to ensure the other 2/3’s of the division is funded. The GCSO also regularly works to get grants that fund specialized equipment and personnel support that support the entire County and Big Sky area, such as Regional Task Forces, Special Response Teams, and Search and Rescue.

**Operations-Quality of Proposal**

The District will evaluate the quality of your proposal based on a well-articulated method for achieving goals.

**Operational Goals and Outcomes**
What are the goals, outcomes, or deliverables of this request?

The Goal of the Big Sky/Canyon Division Patrol is to continue to provide first class law enforcement services in the Big Sky area.

**Metrics**
Please list the metrics you will use to measure success.

N/A

**Operations-Articulates Long-Term Vision**

**Operational Vision**
What is the long-term vision of your operation?

The long-term vision of the Gallatin County Sheriff’s Office and the Big Sky/Canyon Division Patrol is to continue to be a community presence that ensure that the residents and visitors of the community feel safe in their person and their property.

**Supplemental Planning Efforts**
Are there any long-term planning documents (e.g. Strategic Plan, Capital Improvement Plan, Master Plan) that directly relate to this request? If so, please list them here.

N/A
**Operations-Consistent With Community Strategy**

The District will evaluate your request based on its alignment with the strategies outlined in the Our Big Sky Community Plan.

**Our Big Sky Strategies**

Please select which strategies outlined in the Our Big Sky Community Vision and Strategy this project/program is working to achieve. Select all that apply.

- Support high-quality community & emergency services

**Strategy Explanation**

Briefly explain how your outcomes meet the needs of the strategies selected. If applicable, please explain any community needs or priorities that this request is assisting with that are not outlined in the Our Big Sky Plan.

Gallatin County Sheriff's Office continues to respond to calls, investigate cases, and provide high quality law enforcement services as expected by the County and communities we serve, including the Big Sky area.

**Operations-Population Served**

The District will evaluate this request based on its ability to serve segments that have a demonstrated need.

**Target Segment**

Identify the community target segment(s) that apply. Please select all that apply.

- Businesses (private and public)
- Children/Families
- Local Workforce
- Non-Profits
- Outdoor Recreationalist
- Part-Time Residents
- Property Owners/HOAs
- Residents in Need of Financial Assistance
- Tourist/Visitor
- Wildlife and Natural Environment
- Year-Round Residents

**People Served Annually**

How many people do you serve on an annual basis?

999999

**Measuring People Served**

How do you plan to track or measure the number of people served?

All people living, working, or visiting Big Sky and the surrounding area are served by this project.
**Locals Served***
Of the number of people served provided above, how many live within the District boundaries?

3100

**Operations-Partnerships**
The District will evaluate your request based on its ability to demonstrate cross-organizational collaboration.

*Partner: An organization providing time, energy, talent, or funding with the intent of collaboratively achieving project goals.*

**Partner List***
Please list your partners and briefly explain their roles and responsibilities.

Gallatin County works with many organizations, including other state, local, and federal law enforcement agencies, mental health organizations, schools, human service organizations, and others.

**Capital**

**Capital Requests***
Do you plan to request funding for capital projects in FY22, FY23, or FY24?

Yes

**Capital Projects**

**FY22 Capital Project Request***
If you are not requesting enter 0.

$0.00

**FY23 Capital Project Request***
If you are not requesting enter 0.

$0.00

**FY24 Capital Project Request***
If you are not requesting enter 0.

$0.00
FY23 & FY24 Capital Projects

Please provide a brief description of your upcoming projects (FY23/24).

A detailed project application will be available during those cycles.

There are currently no Capital Requests, but the Gallatin County Sheriff’s Office may begin having preliminary discussion regarding an impending need to find a new location for the Sheriff’s Office physical location in Big Sky as a result of Big Sky Fire requiring the space currently used by the Sheriff’s Office.
GALLATIN CANYON WATER & SEWER DISTRICT (GCWSD)
$74,000 (0.80% of total FY22 requests)

1 Project

Revenue Distribution
Current FY-Budgeted

Financial Sustainability
Prev. FY-Actual

Expense Distribution
Current FY-Budgeted
Sponsor did not provide data

Sponsor did not provide data

Award Trends
Newly formed organization data not available

Future Requests
FY23 Operations: $74,000
FY24 Operations: $74,000
Capital Projects: Not forecasted

Forecasting Accuracy
Newly formed organization data not available

Annual Operating Budget Growth
% Variance next year: 0%
% Variance year after: 0%

Community Participation
- Volunteer Hours: 100
- Volunteers: 1
- Program Count: 0
- Program Participants: 0
- Event Count: 0
- Event Attendance: 0
- Number of Donors: 5
- Local Donation Amount: $4,000

Track Record
Goals:
Accomplishments:
Outcomes:
Our organization was just formed at the end of 2020, this will be our first cycle asking for the support of the Resort Tax District

Contract Compliance
Payment Requests:
Timely Responses: Responsive
Public Recognition of BSRAD:
Award Orientation Attendance:
Newly formed organization data not available
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>0</td>
<td>100% Reliance on resort tax</td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>25</td>
<td>15</td>
<td></td>
</tr>
</tbody>
</table>
### SPONSOR EFFICIENCY

The District will be evaluating your organizational reliance on Resort Tax revenues and your Program Expense Ratio.

<table>
<thead>
<tr>
<th>Revenue (Cash only, do not include In-Kind)</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue</th>
<th>Current FY</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Funding</td>
<td>n/a</td>
<td>$74,000.00</td>
<td>#VALUE!</td>
<td>100%</td>
<td>74,000.00</td>
<td></td>
</tr>
<tr>
<td>Resort Tax</td>
<td>n/a</td>
<td>#VALUE!</td>
<td></td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
<td>n/a</td>
<td>#VALUE!</td>
<td></td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fundraising</td>
<td>n/a</td>
<td>#VALUE!</td>
<td></td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private Donations</td>
<td>n/a</td>
<td>#VALUE!</td>
<td></td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corporate Donations &amp; Sponsorships</td>
<td>n/a</td>
<td>#VALUE!</td>
<td></td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants</td>
<td>n/a</td>
<td>#VALUE!</td>
<td></td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Events</td>
<td>n/a</td>
<td>#VALUE!</td>
<td></td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Revenue</td>
<td>n/a</td>
<td>#VALUE!</td>
<td></td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dues, Fees, Membership, Sales</td>
<td>n/a</td>
<td>#VALUE!</td>
<td></td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>n/a</td>
<td>#VALUE!</td>
<td></td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>COVID-19 Relief*</td>
<td>n/a</td>
<td>#VALUE!</td>
<td></td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other*</td>
<td>n/a</td>
<td>#VALUE!</td>
<td></td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>n/a</td>
<td>$74,000.00</td>
<td>#VALUE!</td>
<td>100%</td>
<td>74,000.00</td>
<td></td>
</tr>
</tbody>
</table>

*Should total 100%*

| Expenses                                  | n/a                | #VALUE!             |          | #VALUE!           | #VALUE!   |  |
|-------------------------------------------|--------------------|---------------------|----------|------------------|-----------|
| Administration                            | n/a                | #VALUE!             |          |                  |           |  |
| Fundraising                               | n/a                | #VALUE!             |          |                  |           |  |
| Programming                               | n/a                | #VALUE!             |          |                  |           |  |
| **TOTAL**                                 | n/a                | #VALUE!             |          |                  |           |  |

*Provide detail on other and COVID-19 Relief received, including sources and amounts*.

### 3-YEAR GROWTH FORECAST

(Include all organization projects and programs, not only those requesting resort tax funding)

<table>
<thead>
<tr>
<th>Employees</th>
<th>Total # of FTE</th>
<th>4/15/2021</th>
<th>4/15/2022</th>
<th>4/15/2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Operations</td>
<td>Payroll &amp; Benefits</td>
<td>$6,000.00</td>
<td>$6,000.00</td>
<td>$6,000.00</td>
</tr>
<tr>
<td>Rent &amp; Mortgage</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Forecasted Expenses</td>
<td>Total Operating Budget (Including Core Operations)</td>
<td>$68,000.00</td>
<td>$68,000.00</td>
<td>$68,000.00</td>
</tr>
<tr>
<td>Capital Expenditures</td>
<td>Reserves*</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Purpose and intent of reserves including any restrictions*:

---

**Note:** The data includes financial information for various revenue and expense categories, along with a 3-year growth forecast, and a mention of SPONSOR EFFICIENCY criteria for the organization.
Gallatin Canyon Water and Sewer District

*Government FY22-FY24*

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**Gallatin Canyon Water and Sewer District**

Scott Altman
PO Box 161242
Big Sky, MT 59716
O: 407-468-3215
M: 407-468-3215

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**Scott Altman**

228 altman lane
228 Altman lane
Gallatin Gateway, MT 59730
orock9530@me.com
O: 407-468-3215
M: 407-468-3215
Application Form

Operations-FY22-FY24 Request

FY22 Operations Request*
What is the amount you are requesting from Resort Tax for FY22 (7/1/21-6/30/22) operations?
$74,000.00

FY23 Operations Request*
What is the amount you are requesting from Resort Tax for FY23 (7/1/22-6/30/23) operations?
$74,000.00

FY24 Operations Request*
What is the amount you are requesting from Resort Tax for FY24 (7/1/23-6/30/24) operations?
$74,000.00

Funding Impact*
How would your operation be affected if Resort Tax funding were not awarded?
The district is also pursuing state funding, but not receiving funding from the resort tax would definitely affect the speed in which the district will be ready to service the canyon.

Budgetary Breakdown
If applicable, 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.
Our district is currently not built yet and will not be able to provide service until the Big Sky Water and Sewer pipeline project is complete.

Category*
Please select the category that best pertains to this project.
Public Health & Safety

Additional Information*
What additional information would you like to share with the District regarding this request?
The plan for this district is to provide services to the residents of the canyon with the primary importance of providing better treatment of sewage discharge to protect the integrity of the Gallatin River which is the lifeblood of our community.
Operations-Financial Sustainability, Reliance, Matching Funds

The District will evaluate your request based on a sustainable funding plan and encourage diverse and matching funding sources.

Pass-Through Funding*
Do any expenses pass-through to other Resort Tax funded projects or sponsoring organizations? If yes, please explain.

No, what we are doing will coordinate with work done by the Gallatin River Task Force and the Big Sky Water and Sewer District but will not pass thru.

Matching Funds Assistance*
How can the District assist in attaining matching funds?

Mace Mangold with WGM will be working on a PER Planning Grant Application with DNRC as well as pursuing other sources and the Canyon District has committed to help the Resort Tax District fund the lobbyist’s efforts to obtain Arpa Funding for the Canyon Projects.

Operations-Quality of Proposal

The District will evaluate the quality of your proposal based on a well-articulated method for achieving goals.

Operational Goals and Outcomes*
What are the goals, outcomes, or deliverables of this request?

This request would provide the internal structure to the organization that will allow it to operate in a manner that the law requires. It will have a website, with the latest information being made available to the community. Hammond Property Management will provide a contact point at all times for the public. Our attorney will create all of the documents required for treatment agreements, annexation agreements and forms and other pertinent documents. We have engineering time to help negotiate a treatment plan with Big Sky Water and Sewer District.

Metrics*
Please list the metrics you will use to measure success.

The metrics will be easily tracked, as all effluent from the canyon will be metered as it is pumped up to the Big Sky Water and Sewer District treatment plant. There have also been studies by WGM engineering tracking the nitrate discharges of the current system and a follow up to that study at different times in the maturation of the system could also provide a visual summary.

Operations-Articulates Long-Term Vision

Operational Vision*
What is the long-term vision of your operation?
Our long term vision is to have infrastructure completed in the canyon and to be able to expand the initial district to service more people and take old septic treatment systems off line and replace them with substantially higher treatment technology.

**Supplemental Planning Efforts**
Are there any long-term planning documents (e.g. Strategic Plan, Capital Improvement Plan, Master Plan) that directly relate to this request? If so, please list them here.

The project that the 1% is paying for, to bring the force main down to the Conoco is the first cog of infrastructure that will make the Canyon District able to provide service. The additional infrastructure that will provide service from the Conoco to the School has been contemplated in the Canyon Sewer Study that the Gallatin River Task Force Commissioned. The district has put this infrastructure project into the state for consideration for the The Arpa funds from the state of Montana

**Operations-Consistent With Community Strategy**
The District will evaluate your request based on its alignment with the strategies outlined in the Our Big Sky Community Plan.

**Our Big Sky Strategies**
Please select which strategies outlined in the Our Big Sky Community Vision and Strategy this project/program is working to achieve. Select all that apply.

- Promote the development of affordable housing
- Improve and maintain infrastructure
- Support independently-owned small businesses
- Preserve a cohesive, but distinct character throughout the community
- Embrace Big Sky’s DNA as a destination, born out of a visitor economy
- Expand & enhance pathways & trail connections
- Preserve & enhance public access to public lands & waterways
- Improve & develop new park spaces & gathering spaces
- Protect wildlife habitat & natural resources
- Protect & enhance our water resources
- Work to become a sustainable & resilient community

**Strategy Explanation**
Briefly explain how your outcomes meet the needs of the strategies selected. If applicable, please explain any community needs or priorities that this request is assisting with that are not outlined in the Our Big Sky Plan.

By providing sewer treatment to the canyon, we will help protect the Gallatin River. The new infrastructure will provide the vehicle to develop more affordable housing and help small business’ survive. With new development comes additional landscaping, trails and the implementation of zoning regulations put in place to protect wildlife and the DNA of Big Sky

**Operations-Population Served**
The District will evaluate this request based on its ability to serve segments that have a demonstrated need.
**Target Segment**
Identify the community target segment(s) that apply. Please select all that apply.

- Businesses (private and public)
- Children/Families
- Local Workforce
- Part-Time Residents
- Property Owners/HOAs
- Residents in Need of Financial Assistance
- Tourist/Visitor
- Wildlife and Natural Environment
- Year-Round Residents

**People Served Annually**
How many people do you serve on an annual basis?

0

**Measuring People Served**
How do you plan to track or measure the number of people served?

As the sewer system becomes active, every user will have an account and will be easily tracked.

**Locals Served**
Of the number of people served provided above, how many live within the District boundaries?

1112

**Operations-Partnerships**
The District will evaluate your request based on its ability to demonstrate cross-organizational collaboration.

*Partner: An organization providing time, energy, talent, or funding with the intent of collaboratively achieving project goals.*

**Partner List**
Please list your partners and briefly explain their roles and responsibilities.

Gallatin River Task Force - GRTF was instrumental in the formation of our district and is a partner in researching septic discharges in the canyon to help develop an expansion plan for the canyon.

Big Sky County Water and Sewer District. The Canyon Sewer district has plans to work in conjunction with the BSCWSD in all aspects of sewer treatment from a coordinated Grease trap plan to ensuring the highest rate of treatment and disposal of effluent.

**Capital**

**Capital Requests**
Do you plan to request funding for capital projects in FY22, FY23, or FY24?

No
BIG SKY COMMUNITY HOUSING TRUST (BSCHT)
$1,910,000 (20.70% of total requests)

Financial Sustainability

Revenue Distribution

- Corporate Donations & Sponsorships, 6%
- Private Donations, 9%
- Grants, 11%
- Resort Tax, 71%
- Other PM & Mgmt Services, 3%

Previous FY-Actual

- Other PM & Mgmt Services, 38%
- Resort Tax, 51%
- Private Donations, 10%

Expense Distribution

Current FY-Budgeted

- Administration, 2%
- Fundraising, 1%

Previous FY-Actual

- Programming, 97%
- Administration, 13%
- Fundraising, 1%

Award Trends

Future Project & Operation Requests
FY23: $1,946,000  FY24: $2,720,000

Forecasting Accuracy
Projected FY22 $2,500,000
Variance: $590,000 (-23.60%)

Annual Operating Budget Growth
% Variance next year: -15.27%
% Variance year after: +35.50%

Community Participation
- Volunteer Hours: 300
- Volunteers: 20
- Program Count: 0
- Program Participants: 175
- Event Count: 2
- Event Attendance: 0
- Number of Donors: 50
- Local Donation Amount: $214,000

Track Record
Goals: The goal of the Big Sky Community Housing Trust is to increase the quantity of affordable housing units for the Big Sky workforce.

Accomplishments: Development of 52 MeadowView workforce housing condos which are 95% complete and all under contract. Down Payment Assistance loans which help many of these households achieve their home ownership dream. Development of a Rent Local website.

Outcomes: Our organization's aim is to support Big Sky’s local economy and enhance the character of the community by improving the availability of affordable housing for local residents.

Contract Compliance
Payment Requests: Accurate & Timely
Timely Responses: Responsive
Public Recognition of BSRAD: Unknown
Award Orientation Attendance: Yes
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td>Good volunteer numbers</td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>0</td>
<td>74% reliance on Resort Tax</td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>3</td>
<td>Contract amendments required</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>25</td>
<td>12</td>
<td></td>
</tr>
</tbody>
</table>
## SPONSOR EFFICIENCY

The District will be evaluating your organizational reliance on Resort Tax revenues and your Program Expense Ratio.

### Previous Fiscal Year: Recently completed Fiscal Year
### Current Fiscal Year: Fiscal Year as of 4/15/21

#### Revenue (Cash only, do not include In-Kind)

<table>
<thead>
<tr>
<th>Public Funding</th>
<th>Previous FY-Actual (Jul 1-Dec 31)</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resort Tax</td>
<td>$74,642.00</td>
<td>$1,660,000.00</td>
<td>2124%</td>
<td>71%</td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
<td>$ -</td>
<td>$ -</td>
<td>#DIV/0! 0%</td>
<td></td>
</tr>
</tbody>
</table>

#### Fundraising

| Private Donations | $15,195.00 | $200,000.00 | 1216% | 9% |
| Corporate Donations & Sponsorships | $ - | $150,000.00 | #DIV/0! 6% |
| Grants | $ - | $250,000.00 | #DIV/0! 11% |
| Events | $ - | $ - | #DIV/0! 0% |

#### Direct Revenue

| Dues, Fees, Memberships, Sales | $ - | $ - | #DIV/0! 0% |
| COVID-19 Relief* | $ - | $ - | #DIV/0! 0% |
| Other* PM & Mgmt Services | $55,320.00 | $75,000.00 | 36% 3% |

#### Total Revenue

|                      | $145,157.00 | $2,335,000.00 | 1509% | 100% |

*Should total 100%

#### Expenses

| Administration | $19,331.00 | $45,000.00 | 133% |
| Fundraising | $1,587.00 | $20,000.00 | 1160% |
| Programming | $128,599.00 | $2,112,462.00 | 1543% |

#### Total Expenses

|                      | $149,517.00 | $2,177,462.00 | $13.56 |

*Provide detail on other and COVID-19 Relief received, including sources and amounts*:

### 3-YEAR GROWTH FORECAST

(Include all organization projects and programs, not only those requesting resort tax funding)

<table>
<thead>
<tr>
<th>Employees</th>
<th>Total # of FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Operations</td>
<td>Total Forecasted Expenses</td>
</tr>
<tr>
<td>Payroll &amp; Benefits</td>
<td>$180,000.00</td>
</tr>
<tr>
<td>Rent &amp; Mortgage</td>
<td>$3,000.00</td>
</tr>
<tr>
<td>Total Operating Budget (Including Core Operations)</td>
<td>$2,177,462.00</td>
</tr>
<tr>
<td>Capital Expenditures</td>
<td>$1,500,000.00</td>
</tr>
<tr>
<td>Assets Reserves*</td>
<td>$125,138.00</td>
</tr>
</tbody>
</table>

*Purpose and intent of reserves including any restrictions*: Reserves will be used in dealing with uncertainties in development costs on future projects and timing of Down Payment Assistance fund payments for new buyers.

Assumes $1.4M allocated from Spring 21

$64,286 deemed liability as held for DPA payments in FY21

$150,000 deemed liabilities as held for DPA payments in FY21

*Should total 100%
BSCHT-FY22

Non-Profit FY22

Big Sky Community Housing Trust (BSCHT)

Laura Seyfang  
PO Box 160164  
50 Meadow Village Dr  
Big Sky, MT 59716  
laura@bigskyhousingtrust.com  
O: 406-995-3696  
M: 937-430-6688

Laura Seyfang  
PO Box 160164  
50 Meadow Village Dr. Suite 202  
Big Sky, MT 59716  
laura@bigskyhousingtrust.com  
O: 406-995-3696  
M: 937-430-6688
Application Form

Track Record (Goals and Outcomes)

Goals*
What were the goals of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

The goal of the Big Sky Community Housing Trust is to increase the quantity of affordable housing units for the Big Sky workforce. BSRAD helped to fund the development of 52 MeadowView workforce housing condos which are 95% complete and all under contract. BSRAD also contributed to Down Payment Assistance loans which help many of these households achieve their home ownership dream. Some funds assisted the development of a Rent Local website, which is beginning to show success as more units are made available to rent to local workers. Funds have also supported the two staff members of this fledgling organization, which has made great strides in only 8 months of incorporation as a separate entity.

Community Outcomes*
What were the community outcomes of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

Our organization’s aim is to support Big Sky’s local economy and enhance the character of the community by improving the availability of affordable housing for local residents.

BSCHT created a first for the community by constructing and selling MeadowView, a deed restricted condominium development for local workers. 98 residents now have permanent housing at about 40% below market rate. The Landing Locals program has to date resulted in 11 additional units successfully rented long term to locals. Fifteen households received Down Payment Assistance loans from Resort Tax funds.

Revenue Reliance on Resort Tax (Financials)
The District uses the following information to evaluate your organization’s ability to plan and efficiently use funds.

Future Growth*
Please explain any predicted 3-year growth including personnel, capital expenditures, operational expansions, and needs that require funding. Explain if you anticipate Resort Tax funds will support this growth.

BSCHT plans to add a fundraising/ community engagement position in 2021/22. Resort Tax will be requested to partially fund this request. As next housing developments are completed (2022/23) an additional staff person will likely be required to assist with project / property management. Again, a request to partially fund is projected from Resort Tax. Capital expenditures are forecast for the next three years to develop much needed additional housing programs. An increase in funds for Rent Local program - to incentivize owners to rent their condos to local workers is being requested this year to bridge the gap till new development projects are completed.

Future Projects*
Other than the project(s) for this year are there any additional Resort Tax funding requests in FY23 (7/1/22-6/30/23) or FY24 (7/1/23-6/30/24)?
Yes

**Future Projects Explanation**
If yes, how much do you plan to request in FY23 and FY24? Also, please provide a brief explanation of any future projects.

- **FY23:** $1.8M capital expenditure for future housing development project - details TBD
- **FY24:** $2M capital expenditure for future housing development project - details TBD

**COVID-19 Impact**
What has the impact of COVID-19 been on your operation and how has this impact affected your Resort Tax request?

- COVID impacted our MeadowView construction schedule with delays in unit completion and significant increases in costs of construction material.

---

**Community Participation**
The District uses the following information to evaluate if your organization has active community participation. Please provide annual counts to the best of your ability.

**Engagement Strategy**
What plans do you have to expand community engagement and participation?

- BSCHT has formed a Community Engagement Committee, comprised of 10 local volunteers (some our Board Members). We are strategizing ways to further educate and engage the community in our mission. We are planning an Open House/ Block Party at MeadowView to showcase this successful Workforce Housing development in conjunction with the Give Big Campaign in May.
Community Participation

- Volunteer Hours: 4,000
- Volunteers: 277
- Program Count: 6
- Program Participants: 1,410

Contract Compliance

Payment Requests: Timely & Accurate
Timely Responses: Responsive
Public Recognition of BSRAD: Yes
Award Orientation Attendance: Yes

Financial Sustainability

Revenue Distribution

- Private Donations, 71%
- Resort Tax, 12%
- Dues, Fees, Memberships, Sales, 2%
- COVID-19 Relief*, 2%
- Events, 3%
- Crowdfunding, 10%

Expense Distribution

- Programming, 83%
- Administration, 15%
- Fundraising, 1%

Future Project Requests

FY23: $1,171,000  FY24: $1,221,500

Forecasting Accuracy

Projected FY22: $1,133,345
Variance: -$155,163 (-13.69%)

Annual Operating Budget Growth

% Variance next year: +51.66%
% Variance year after: +20.03%

Track Record

Goals: The goals of the last 3 years of resort tax funding have been consistent with trail and park improvements identified in our Master Trails & Parks plans.

Accomplishments: BSCO has successfully balanced providing excellent service to our community by operating and maintaining 23.25 miles of trails, 14km of groomed winter trails and 100 acres of public parks while also continuing to meet the growing needs of our community with additional trails and park amenities.

Outcomes: BSCO has increased the number of public park acres from 93 to 100 acres and increased trail miles from 19 to 23.25 miles. Executed a community winter trail system for all users. Completed the design and engineering improvements of Beehive Basin and Ousel Falls Trailheads.
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td>Excellent donation, volunteer, and attendance numbers</td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>10</td>
<td>Award trend on good trajectory, large increases in operating budget growth</td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>25</strong></td>
<td><strong>25</strong></td>
<td></td>
</tr>
<tr>
<td>Revenue (Cash only, do not include In-Kind)</td>
<td>Previous FY-Actual</td>
<td>Current FY-Budgeted</td>
<td>% Change</td>
<td>% of total Revenue Current FY</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>--------------------</td>
<td>---------------------</td>
<td>----------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td><strong>Public Funding</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resort Tax</td>
<td>$2,210,935.00</td>
<td>$553,735.26</td>
<td>-75%</td>
<td>12%</td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
<td>$-</td>
<td>$-</td>
<td>#DIV/0!</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Fundraising</strong></td>
<td>$6,157,869.56</td>
<td>$3,326,927.00</td>
<td>-46%</td>
<td>71%</td>
</tr>
<tr>
<td>Corporate Donations &amp; Sponsorships</td>
<td>$-</td>
<td>$-</td>
<td>#DIV/0!</td>
<td>0%</td>
</tr>
<tr>
<td>Grants</td>
<td>$96,168.00</td>
<td>$445,250.00</td>
<td>363%</td>
<td>10%</td>
</tr>
<tr>
<td>Events</td>
<td>$173,815.00</td>
<td>$133,685.00</td>
<td>-23%</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Direct Revenue</strong></td>
<td>$98,512.19</td>
<td>$99,770.00</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Dues, Fees, Memberships,</td>
<td>$9,851.19</td>
<td>$9,851.19</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td>$12,905.00</td>
<td>$91,900.00</td>
<td>612%</td>
<td>2%</td>
</tr>
<tr>
<td>COVID-19 Relief*</td>
<td>$63,115.64</td>
<td>$10,825.00</td>
<td>-83%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$8,813,320.39</td>
<td>$4,662,092.26</td>
<td>-47%</td>
<td>100%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>$218,417.00</td>
<td>$200,812.40</td>
<td>-8%</td>
<td></td>
</tr>
<tr>
<td>Fundraising</td>
<td>$6,234.00</td>
<td>$18,025.00</td>
<td>189%</td>
<td></td>
</tr>
<tr>
<td>Programming</td>
<td>$1,054,850.00</td>
<td>$1,076,931.74</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$1,279,501.00</td>
<td>$1,295,769.14</td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>

*Provide detail on other and COVID-19 Relief received, including sources and amounts*: Previous FY – Actual:
- B/9/20 MT Cares Act $10K
- B/24/20 MT Adaptability $2,905

Current FY – Budgeted:
- B2/1/20 PPP Loan Forgiven $91,900

Current FY – Actual:
- 30/22/20 MT Social Services $89,224

Other Income consists of interest revenue and donation box revenue.
### 3-YEAR GROWTH FORECAST

*(Include all organization projects and programs, not only those requesting resort tax funding)*

<table>
<thead>
<tr>
<th>Employees</th>
<th>Core Operations</th>
<th>Total Forecasted Expenses</th>
<th>Assets</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Current 7.1.20-6.30.21 (*please enter your fiscal year dates)</td>
<td>Year 2 7.1.21-6.30.22 (*please enter your fiscal year dates)</td>
<td>Year 3 7.1.22-6.30.23 (*please enter your fiscal year dates)</td>
</tr>
<tr>
<td></td>
<td>Total # of FTE</td>
<td>Payroll &amp; Benefits</td>
<td>$</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Rent &amp; Mortgage</td>
<td>$</td>
</tr>
<tr>
<td>Core Operations</td>
<td>Total Operating Budget (Including Core Operations)</td>
<td>Total Forecasted Expenses</td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>Capital Expenditures</td>
<td>Capital Expenditures</td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>Reserves*</td>
<td>$</td>
<td>479,152</td>
</tr>
</tbody>
</table>

*Purpose and intent of reserves including any restrictions*: BSCO currently has reserves for operations and depreciation. The depreciation reserve is calculated based on assets fully depreciated or nearly fully depreciated and the operation reserve is based on operating for 3 months. In the next coming years as we expand with BASE, we will need to increase both of these reserves as our operations and assets grow.
BSCO-FY22

Non-Profit FY22

Big Sky Community Organization

Whitney Montgomery
PO Box 161404
32 Town Center Ave, B1
Big Sky, MT 59716
bsco@bscomt.org
O: 406-993-2112
M: 406-993-2112

Michelle Laxson
PO Box 161404
32 Town Center Ave, B1
Big Sky, MT 59716
bsco@bscomt.org
O: 406-993-2112
M: 406-993-2112
Track Record (Goals and Outcomes)

Goals *

What were the goals of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

The goals of the last 3 years of resort tax funding have been consistent with trail and park improvements identified in our Master Trails & Parks plans. We have continued to work diligently to develop the best model for quality and efficiency within our operations and maintenance of our expanding parks and trails system.

BSCO has successfully balanced providing excellent service to our community by operating and maintaining 23.25 miles of trails, 14km of groomed winter trails and 100 acres of public parks while also continuing to meet the growing needs of our community with additional trails and park amenities, including the addition of indoor facilities and recreation opportunities for all ages and abilities through the construction of BASE.

Community Outcomes *

What were the community outcomes of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

Over the past 3 funding years BSCO has increased the number of public park acres from 93 to 100 acres and increased trail miles from 19 to 23.25 miles. Executed a community winter trail system for all users meeting our objectives of multi-use and pedestrian safe routes. Completed the design and engineering improvements of Beehive Basin and Ousel Falls Trailheads to meet all objectives in safety, environmental stewardship and education.

BSCO continues to collaborate with many community partners, land managers, resorts, developers and private property owners to ensure community input is identified and prioritized within our projects.

Revenue Reliance on Resort Tax (Financials)

The District uses the following information to evaluate your organization’s ability to plan and efficiently use funds.

Future Growth *

Please explain any predicted 3-year growth including personnel, capital expenditures, operational expansions, and needs that require funding. Explain if you anticipate Resort Tax funds will support this growth.

BSCO will continue to work to bring all maintenance services in house through purchase of equipment and having BSCO staff handle the work typically contracted out. We anticipate BSRAD to help with a portion of the purchase of the equipment. We will continue to work with other partners to expand and improve public recreation spaces and trails, which will increase our overall staff & operating expenses. We will continue to request BSRAD to help fund a portion of these costs used to maintain the spaces for the Big Sky community and visitors.

BASE is scheduled to open Jan 2022 which will increase staffing over the next few years. While do not expect BSRAD to fund these positions, we anticipate BSRAD to help fund a portion of the BASE facility
operations. With the opening of BASE, we anticipate a significant increase in programs offered, however do not anticipate BSRAD to fund the program expansion.

**Future Projects***
Other than the project(s) for this year are there any additional Resort Tax funding requests in FY23 (7/1/22-6/30/23) or FY24 (7/1/23-6/30/24)?
Yes

**Future Projects Explanation**
If yes, how much do you plan to request in FY23 and FY24? Also, please provide a brief explanation of any future projects.

*Cost estimates for Parks, Trails, and Maintenance Equipment are at full project price. BSCO will be applying for grants and other funding to provide a match to each project to decrease the amount requested.

**FY2022.2023**
- Operations & Maintenance - $721,000
- Parks: Continue build out of Community Park Master plan - $70,000
- Trails: Build an approximated 6 miles of trails and trailhead improvements as part of the Master Trails Plan build out - $350,000
- Maintenance Equipment: $100,000

**FY 2023.2024**
- Operations & Maintenance - $774,000
- Parks: Continue build out of Community Park Master plan - $237,500
- Trails: Build and improve approximately 7 miles of trails and improve one trail head - $210,000

**COVID-19 Impact***
What has the impact of COVID-19 been on your operation and how has this impact affected your Resort Tax request?
Covid-19 impacted our operations as outdoor activities are the safest form of recreation during these uncertain times. Our data since last year shows an increase in our parks and on our trails of 20%-350%. Due to the increased usage, we have had to increase our maintenance staff to maintain our facilities, while continuing to keep facilities clean in accordance with COVID guidelines, which will be reflected in the upcoming BSRAD ask.

**Community Participation**
The District uses the following information to evaluate if your organization has active community participation. Please provide annual counts to the best of your ability.
**Engagement Strategy**

What plans do you have to expand community engagement and participation?

BSCO will continue to offer our existing programs and volunteer opportunities to encourage the community to stay engaged with our parks, trails and recreational programs. We will continue to solicit community input to identify its needs and desires and prioritize the improvements within the parks and trails system, as well as provide an exceptional indoor facility and recreation opportunities for all.
**Financial Sustainability**

**Revenue Distribution**
- Current FY-Budgeted
  - Resort Tax, 52%
  - Other (IE Mill levies, County, State), 25%
  - COVID-19 Relief*, 23%
  - Other*, 1%

**Previous FY-Actual**
- Resort Tax, 56%
- Other (IE Mill levies, County, State), 42%
- Other*, 2%

**Expense Distribution**
- Current FY-Budgeted
  - Programming, 81%
  - Administration, 19%
  - Fundraising, 0%

**Award Trends**

**Future Project Requests**
- FY23: $847,854
- FY24: $920,305

**Forecasting Accuracy**
- Projected FY22: $664,000
- Variance: +$117,491 (+17.69%)

**Annual Operating Budget Growth**
- % Variance next year: 20.80%
- % Variance year after: +4.35%

**Community Participation**
- Volunteer Hours: 960
- Volunteers: 40
- Program Count: 2
- Program Participants: 100
- Event Count: 1
- Event Attendance: 60
- Number of Donors: 0
- Local Donation Amount: $0

**Contract Compliance**
- Payment Requests: Timely, had accuracy issues
- Timely Responses: Responsive
- Public Recognition of BSRAD: Unknown
- Award Orientation Attendance: Yes

**Track Record**

**Goals:** Our goal is to support Big Sky's continued evolution from a destination ski resort to a sustainable, year-round community by flattening out the seasonality of our destination's visitation, shortening the shoulder seasons, building up summer to rival winter, and mitigating risks from weather by planning.

**Accomplishments:** Because of COVID19, the focus of VBS shifted from bringing guests to our community to saving our local businesses so they may serve our guests in the future. Part of the funding we received last year from resort tax and the multiple grants that we received from the state allowed us to give to the community PPE and COVID test kits.

**Outcomes:** Because of COVID19, the focus of VBS shifted from bringing guests to our community to saving our local businesses so they may serve our guests in the future. We do feel our strong involvement in community safety has resulted in a healthy and strong start to reviving our economy.
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>5</td>
<td>Programming to Administration ratio good</td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>25</strong></td>
<td><strong>20</strong></td>
<td></td>
</tr>
</tbody>
</table>
## SPONSOR EFFICIENCY

The District will be evaluating your organizational reliance on Resort Tax revenues and your Program Expense Ratio.

<table>
<thead>
<tr>
<th>Revenue (Cash only, do not include In-Kind)</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue</th>
<th>Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Funding</td>
<td>Resort Tax</td>
<td>$500,000.00</td>
<td>$744,126.00</td>
<td>49%</td>
<td>52%</td>
</tr>
<tr>
<td></td>
<td>Other (IE Mill levies, County, State)</td>
<td>$372,396.00</td>
<td>$357,182.00</td>
<td>-4%</td>
<td>25%</td>
</tr>
<tr>
<td>Fundraising</td>
<td>Private Donations</td>
<td>#DIV/0!</td>
<td>#DIV/0!</td>
<td>0%</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td></td>
<td>Corporate Donations &amp; Sponsorships</td>
<td>#DIV/0!</td>
<td>#DIV/0!</td>
<td>0%</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td></td>
<td>Grants</td>
<td>#DIV/0!</td>
<td>#DIV/0!</td>
<td>0%</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td></td>
<td>Events</td>
<td>#DIV/0!</td>
<td>#DIV/0!</td>
<td>0%</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td>Direct Revenue</td>
<td>Dues, Fees, Memberships, Sales</td>
<td>#DIV/0!</td>
<td>#DIV/0!</td>
<td>0%</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td>Other</td>
<td>COVID-19 Relief*</td>
<td>$20,099.00</td>
<td>$20,099.00</td>
<td>-38%</td>
<td>1%</td>
</tr>
<tr>
<td></td>
<td>Other*</td>
<td>$330,771.00</td>
<td>#DIV/0!</td>
<td>23%</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td></td>
<td>TOTAL</td>
<td>$892,495.00</td>
<td>$1,444,579.00</td>
<td>62%</td>
<td>100%</td>
</tr>
</tbody>
</table>

*Should total 100%.

Other Income is Visitor Guide Revenue and sponsorship income. The COVID income was applied for and received during FY 21 so the budget was changed to reflect that income and program expense which 100% offset each other.

### 3-YEAR GROWTH FORECAST

(Include all organization projects and programs, not only those requesting resort tax funding)

<table>
<thead>
<tr>
<th>Employees</th>
<th>Total # of FTE</th>
<th>Core Operations</th>
<th>Payroll &amp; Benefits</th>
<th>Rent &amp; Mortgage</th>
<th>Total Operating Budget (Including Core Operations)</th>
<th>Capital Expenditures</th>
<th>Assets</th>
<th>Reserves*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>07/01/2020-06/30/2021</td>
<td>3.5</td>
<td>07/01/2021-06/30/2022</td>
<td>07/01/2022-06/30/2023</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees</td>
<td>$27,000.00</td>
<td>$27,000.00</td>
<td>$27,000.00</td>
<td>$1,087,397.00</td>
<td>$861,244.00</td>
<td>$898,740.00</td>
<td>$90,872.00</td>
<td></td>
</tr>
</tbody>
</table>

The total operating budget was reduced for FY22 and FY 23 because this current year has COVID19 state grants that VBS does not expect to receive in the future.
Visit Big Sky-FY22

Non-Profit FY22

Visit Big Sky

TBD TBD lori@bigskychamber.com
Po Box 160100 0: 406-995-3606
88 Ousel Falls Road, Unit A1 M: 406-995-3000
Big Sky, MT 59716

Lori Wetzel

PO Box 160100 info@bigskychamber.com
88 Ousel Falls Road, Unit A1 O: 406-995-3606
Big Sky, MT 59716 M: 406-696-1912
**Track Record (Goals and Outcomes)**

**Goals**
What were the goals of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

Our goal is to support Big Sky’s continued evolution from a destination ski resort to a sustainable, year-round community by flattening out the seasonality of our destination’s visitation, shortening the shoulder seasons, building up summer to rival winter, and mitigating risks from weather by planning. The first quarter of the year, ski season, brings in 3x as much in tax revenue than summer. VBS is working to eliminate that imbalance. Continual and consistent messaging is the foundation upon which a destination’s reputation is built. The metrics to reach these goals will need to be continually refined to meet the needs of the visitors to our destination. With the onset of COVID19, the marketing goals were put in a holding pattern until visitors from the USA and especially out of country can travel safely again so the focus was shifted to the safety of our local community.

**Community Outcomes**
What were the community outcomes of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

Because of COVID19, the focus of VBS shifted from bringing guests to our community to saving our local businesses so they may serve our guests in the future. Part of the funding we received last year from resort tax and the multiple grants that we received from the state allowed us to give to the community PPE and COVID test kits. So far, our community is surviving the pandemic and having a decent winter season with many of the lodging facility bookings under capacity but close to expectations. All the precautions that were put in place by state mandate and the availability for VBS to offer PPE free to the community helped keep us safe and open. We do feel our strong involvement in community safety has resulted in a healthy and strong start to reviving our economy.

**Revenue Reliance on Resort Tax (Financials)**

The District uses the following information to evaluate your organization's ability to plan and efficiently use funds.

**Future Growth**
Please explain any predicted 3-year growth including personnel, capital expenditures, operational expansions, and needs that require funding. Explain if you anticipate Resort Tax funds will support this growth.

Visit Big Sky will have new leadership in the near future so expansion that needs funding is primarily reserved for our new CEO and their vision for Big Sky on the application for FY23. One new project that staff will take on for this resort tax cycle will be a dining guide that can be used by all the lodging facilities in our community together with our second home owners that come into market for a few weeks a year. This project will require resort tax funding to create and publish the guide because most visitors are asking their lodging facilities to offer dining choice assistance.
Future Projects*
Other than the project(s) for this year are there any additional Resort Tax funding requests in FY23 (7/1/22-6/30/23) or FY24 (7/1/23-6/30/24)?

Yes

Future Projects Explanation
If yes, how much do you plan to request in FY23 and FY24? Also, please provide a brief explanation of any future projects.

Future projects will be the vision of our new CEO and are not able to be defined at this time. The Board of Directors will be monitoring the success of our new marketing agency, Karsh Hagan. If successful, the scope of work will be enhanced in the future to cover any markets that are being missed in the current campaigns. A conservative estimate of future funding would be: FY23 $825,000 and FY24 $875,000.

COVID-19 Impact*
What has the impact of COVID-19 been on your operation and how has this impact affected your Resort Tax request?

COVID19 has changed the focus of Visit Big Sky from wanting to increase visitation to sustaining the local businesses through the pandemic so they will be able to service our guests when travel restrictions are lifted. VBS and the Chamber joined forces to give businesses micro grants to help with rent, utilities and other operating expenses so their doors could remain open during this pandemic. VBS also applied for and received grant funding from the State for safety messaging and safety PPE items, such as masks, which we gave to locals in the community free of charge. We also committed $250,000 to the Big Sky Relief effort which offered free COVID tests to those in our community who live or work in Big Sky. We would like to believe that our efforts were instrumental in keeping Big Sky safe, strong and open during this pandemic. With the drastic impacts of COVID on our community, VBS must now shift our focus back to marketing our destination to guests.

Community Participation
The District uses the following information to evaluate if your organization has active community participation. Please provide annual counts to the best of your ability.

Engagement Strategy*
What plans do you have to expand community engagement and participation?

Our immediate plans include engaging in a marketing campaign with Karsh Hagan to bring visitors back to our destination to enjoy the outdoors. Tourism is not just about speaking to potential visitors, it is about ensuring Big Sky locals embrace that we were born a destination ski resort so the visitor economy is the lifeblood of our community and working together with Big Sky’s residents to support the industry will allow all of us to be able to live here and have the quality of life we do.
Financial Sustainability

**Revenue Distribution**

- Current FY-Budgeted
- Previous FY-Actual

**Expense Distribution**

- Current FY-Budgeted

**Award Trends**

Future Project Requests
FY23: $634,523  FY24: $485,705

Forecasting Accuracy
Projected FY22: $700,000
Variance: -$138,438 (-19.49%)

Annual Operation Budget Growth
% Variance next year: +12.59%
% Variance year after: +29.96%

Community Participation
- Volunteer Hours: 1,300
- Volunteers: 150
- Program Count: 5
- Program Participants: 100
- Event Count: 20
- Event Attendance: 1,000
- Number of Donors: 300
- Local Donation Amount: $400,000

Contract Compliance
Payment Requests: Timely, accuracy issues have improved.
Timely Responses: Responsive
Public Recognition of BSRAD: Yes
Award Orientation Attendance: Yes

Track Record

Accomplishments: All goals for Resort Tax funded projects were achieved.

Outcomes: Streamflow gauge installed. Annual water quality reports. 6.6 million gallons water saved. Advanced Deer Creek trailhead restoration design to 95%. Multiple plans updated and completed. Regular public communications. Installed 290 feet of purple pipe in the Town Center. Public water system manager survey conducted. 3+ tons of trash removed from watershed.
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td>Great event participation and volunteer participation</td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td>Excellent work supporting newly formed Water &amp; Sewer District</td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>25</td>
<td>25</td>
<td></td>
</tr>
</tbody>
</table>
## SPONSOR EFFICIENCY

The District will be evaluating your organizational reliance on Resort Tax revenues and your Program Expense Ratio.

### Previous Fiscal Year:
Recently completed Fiscal Year

### Current Fiscal Year:
Fiscal Year as of 4/15/21

<table>
<thead>
<tr>
<th>Source</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Public Funding</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resort Tax</td>
<td>$465,041.12</td>
<td>$341,972.00</td>
<td>-26%</td>
<td>31%</td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
<td>$67,878.75</td>
<td>$96,000.00</td>
<td>41%</td>
<td>9%</td>
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<tr>
<td><strong>Fundraising</strong></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private Donations</td>
<td>$58,637.00</td>
<td>$40,000.00</td>
<td>-32%</td>
<td>4%</td>
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<tr>
<td>Corporate Donations &amp; Sponsorships</td>
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<td>$50,000.00</td>
<td>-3%</td>
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<td>Grants</td>
<td>$85,117.00</td>
<td>$127,550.00</td>
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<td>12%</td>
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<td>Events</td>
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<td>$60,000.00</td>
<td>-19%</td>
<td>5%</td>
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<td><strong>Direct Revenue</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dues, Fees, Memberships, Sales</td>
<td>$30,841.27</td>
<td>$45,400.00</td>
<td>47%</td>
<td>4%</td>
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<tr>
<td><strong>Other</strong></td>
<td></td>
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<tr>
<td>COVID-19 Relief*</td>
<td>$47,235.00</td>
<td>$10,000.00</td>
<td>-79%</td>
<td>1%</td>
</tr>
<tr>
<td>Other* GRF Capital Campaign -</td>
<td>$137,325.66</td>
<td>$326,702.00</td>
<td>138%</td>
<td>30%</td>
</tr>
<tr>
<td>pledge installments and reserves</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,017,782.41</strong></td>
<td><strong>1,097,624.00</strong></td>
<td>8%</td>
<td>100%</td>
</tr>
</tbody>
</table>

*Should total 100%*

### Direct Revenue

- **Dues, Fees, Memberships, Sales**: $30,841.27, $45,400.00
- **COVID-19 Relief**: $47,235.00, $10,000.00
- **Other GRF Capital Campaign**:
  - Pledge installments: $137,325.66
  - Reserves: $326,702.00

### Expenses

<table>
<thead>
<tr>
<th>Category</th>
<th>Current FY</th>
<th>Year 1 FY</th>
<th>Year 2 FY</th>
<th>Year 3 FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Operating Budget (Including Core Operations)</td>
<td>$1,102,003.00</td>
<td>$1,240,703.90</td>
<td>$1,612,359.00</td>
<td></td>
</tr>
<tr>
<td>Core Operations</td>
<td>$12,800.00</td>
<td>$30,000.00</td>
<td>$31,500.00</td>
<td></td>
</tr>
<tr>
<td>Rent &amp; Mortgage</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payroll &amp; Benefits</td>
<td>$39,249</td>
<td>$40,531.38</td>
<td>$42,807.90</td>
<td></td>
</tr>
<tr>
<td>Total Forecasted Expenses</td>
<td>$1,102,003.00</td>
<td>$1,240,703.90</td>
<td>$1,612,359.00</td>
<td></td>
</tr>
<tr>
<td>Core Operations</td>
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<td>$31,500.00</td>
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</tr>
<tr>
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<td>$1,240,703.90</td>
<td>$1,612,359.00</td>
<td></td>
</tr>
<tr>
<td>Capital Expenditures</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assets</td>
<td>$406,656.00</td>
<td>$306,656.00</td>
<td>$206,656.00</td>
<td></td>
</tr>
</tbody>
</table>

*Purpose and Intent of reserves including any restrictions*: Reserves are restricted to Gallatin River Forever campaign initiatives and 3 months of operating costs.

### 3-YEAR GROWTH FORECAST

(Include all organization projects and programs, not only those requesting resort tax funding)

<table>
<thead>
<tr>
<th>Category</th>
<th>Current FY</th>
<th>Year 1 FY</th>
<th>Year 2 FY</th>
<th>Year 3 FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payroll &amp; Benefits</td>
<td>$39,249</td>
<td>$40,531.38</td>
<td>$42,807.90</td>
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</tr>
<tr>
<td>Rent &amp; Mortgage</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
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<td>$1,102,003.00</td>
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</tr>
<tr>
<td>Core Operations</td>
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<td>$30,000.00</td>
<td>$31,500.00</td>
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</tr>
<tr>
<td>Total Forecasted Expenses</td>
<td>$1,102,003.00</td>
<td>$1,240,703.90</td>
<td>$1,612,359.00</td>
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</tr>
<tr>
<td>Core Operations</td>
<td>$12,800.00</td>
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<tr>
<td>Total Operating Budget (Including Core Operations)</td>
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<td>Assets</td>
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<td></td>
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</tbody>
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*Purpose and Intent of reserves including any restrictions*: Reserves are restricted to Gallatin River Forever campaign initiatives and 3 months of operating costs.
GRTF-FY22

Non-Profit FY22

Gallatin River Task Force

Kristin Gardner  
PO Box 160513  
Big Sky, MT 59716  
O: 406-993-2519  
M: 406-539-2350  
headwaters@gallatinrivertaskforce.org

Kristin Gardner

PO Box 160513  
32 Meadow Village Drive, Unit 6  
Big Sky, MT 59716  
O: 406-993-2519  
M: 406-539-2350  
kristin@gallatinrivertaskforce.org
Application Form

Track Record (Goals and Outcomes)

Goals*
What were the goals of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

All goals for Resort Tax funded projects were achieved; however, many have additional steps to achieve long-term goals:
- Track continuous streamflow and temperature on the Upper Gallatin
- Water quality and streamflow data collection and reporting to guide water management priorities and assess: trends, road traction sand impacts, algae drivers, and restoration success.
- Reduce per capita water use
- Improve ecological health and access along Upper Gallatin corridor
- Improve water quality in impaired streams and work towards lifting TMDLs designation
- Expand public engagement and river stewardship through digital and print media
- Upgrade wastewater treatment in Gallatin Canyon
- Expand wastewater reuse options that benefit watershed health
- Coordinate water resource management across Big Sky, tailor conservation strategies for individual public water systems to build resilience against future water shortages
- Host annual river cleanup to remove trash from the Upper Gallatin Corridor

Community Outcomes*
What were the community outcomes of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

Community outcomes correspond to goals listed above:
- Installed USGS streamflow gauge at Upper Deer Creek
- Annual water quality reports that guide org priorities
- 101 participants, 197 fixtures installed, 6.6 million gallons water saved
- Advanced Deer Creek trailhead restoration design to 95%; Upper Deer Creek: boat & kayak launch, 1/4 mile riparian buffer enhancements, ADA accessible fishing platform and trails, 2 boat launches; Porcupine: conceptual plans, fish passage analysis, wetland delineation, floodplain analysis.
- Middle Fork and Chapel spring restoration conceptual plans, updated West Fork Nitrogen Reduction plan
- Annual report, monthly newsletters, biweekly water column in EBS
- Gallatin Canyon Wastewater Management Feasibility study completed
- Installed 290 feet of purple pipe in the Town Center
- Public water system manager survey conducted, workshop completed, data gathered, and now working on updating the water conservation plan
- 3+ tons of trash removed from watershed

Revenue Reliance on Resort Tax (Financials)
The District uses the following information to evaluate your organization's ability to plan and efficiently use funds.
**Future Growth**
Please explain any predicted 3-year growth including personnel, capital expenditures, operational expansions, and needs that require funding. Explain if you anticipate Resort Tax funds will support this growth.

For operational and personnel costs, our expected ask to Resort Tax will not grow; we expect to continue to decrease it over time. A top goal for us is to become self-sufficient for operations, through increasing unrestricted donation funding (a long term plan to do this is being finalized.) However, in line with BSRAD’s desire to fund more capital projects, and major water needs outlined in the Big Sky Sustainable Watershed Stewardship Plan (BSSWSP); there is a growing number of capital projects around the river, water and infrastructure that we will submit for public funding, to further protect this finite resource. The support of BSRAD on future projects will be more important than ever, as it can help fill the void for community municipality needs around water quality & quantity--where a formal government doesn’t exist today. We are excited about this and building as much private and public funding to match BSRAD, as is possible.

**Future Projects**
Other than the project(s) for this year are there any additional Resort Tax funding requests in FY23 (7/1/22-6/30/23) or FY24 (7/1/23-6/30/24)?

Yes

**Future Projects Explanation**
If yes, how much do you plan to request in FY23 and FY24? Also, please provide a brief explanation of any future projects.

We aim to complete major restoration projects with BSRAD support, combined with other public/private funding. These asks for high impact projects will align with community visioning. Estimated costs below will be further defined with advancement in design plans over FY 21& 22:

1) Porcupine River Access: stream restoration, trails, bridges, boat launch ~$300K.
2) Chapel Spring: Wetland treatment of major nitrogen source to the impaired West Fork (~$275K (~-20%,+40%).
3) Gallatin River Access Parking + Revegetation: @ approx.12 river access sites. ~ $77K.
4) Middle Fork West Fork: complete restoration of 5 project areas by FY25. ~$150-200K.

We will also request funds for projects outlined in the BSSWSP, such as purple pipe connect in Town Center to BSWSD (estimated @ $118K). By July 2021, we will complete 3 visionary planning documents to guide projects for: stormwater/recharge, river access restoration & water conservation. These will guide future requests (likely some in FY23 & 24).

**COVID-19 Impact**
What has the impact of COVD-19 been on your operation and how has this impact affected your Resort Tax request?

COVID-19 severely curtailed meeting and connecting with donors in person, which negatively impacted our ability to raise funds from individuals and events. Conservative budgeting and scenario planning helped us to reduce expenses and overhead, despite continued unknowns. We feel uncertainty for FY 22 is less severe looking ahead, with an expected rebound, but we did still account for it in our revenue goals for the year.
Community Participation
The District uses the following information to evaluate if your organization has active community participation. Please provide annual counts to the best of your ability.

Engagement Strategy*
What plans do you have to expand community engagement and participation?

- Plans include a new events series to run weekly in summer to connect people directly to the river. It includes recreational activities & educational opportunities, like hikes along impaired streams to better grasp our water challenges. Long term plans also include creating a 50-member Ambassador Alliance of well-informed leaders who champion the cause of clean water and increase fundraising ability through untapped networks & resources. We also plan to continue to grow our digital footprint.
**Community Participation**

- Volunteer Hours: 648
- Volunteers: 27
- Program Count: 6
- Program Participants: 200

**Contract Compliance**

- Payment Requests: Accurate & Timely
- Timely Responses: Responsive
- Public Recognition of BSRAD: Yes
- Award Orientation Attendance: Yes

**Future Project Requests**

- FY23: $379,000
- FY24: $400,000

**Financial Sustainability**

**Revenue Distribution**

<table>
<thead>
<tr>
<th>Current FY-Budgeted</th>
<th>Previous FY-Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dues, Fees, Memberships, Sales, 15%</td>
<td>Dues, Fees, Memberships, Sales, 17%</td>
</tr>
<tr>
<td>Resort Tax, 42%</td>
<td>Resort Tax, 35%</td>
</tr>
<tr>
<td>Other*, 43%</td>
<td>Other*, 47%</td>
</tr>
</tbody>
</table>

**Expense Distribution**

- Current FY-Budgeted
  - Programming 35%
  - Administration 65%
- Previous FY-Actual
  - Fundraising 0%
  - Programming 15%
  - Administration 85%

**Award Trends**

- District Award Trend
- BSCOC Award Trend

**Contract Compliance**

- Payment Requests: Accurate & Timely
- Timely Responses: Responsive
- Public Recognition of BSRAD: Yes
- Award Orientation Attendance: Yes

**Forecasting Accuracy**

- Projected FY22: $450,000
- Variance: $128,493 (-28.55%)

**Track Record**

**Goals:**

1. Advocate for our businesses as we Work to Become a Sustainable & Resilient Community;
2. Create a Positive Business Climate by Providing Transparency/Engagement;
3. Encourage Community Infrastructure and finally 4) Facilitate Local Governance.

**Accomplishments:**

All the projects we sponsor and facilitate align with our strategic plan and all resort tax funded projects have met one or more of our goals.

**Outcomes:**

Sponsored projects (Eggs & Issues/JCC, Leadership Big Sky, BBER Conference) have now become self-funded through private funding which opens the Chamber to birth new projects to help maintain and grow the Big Sky community.

**BSRAD SPONSOR BINDER**

Page 65 of 138
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td>Well attended events, will include question for memberships on next year’s application</td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>5</td>
<td>42% reliance on Resort Tax, good award trend trajectory</td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td>Strong use of industry jargon, difficult to understand measurability</td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>25</strong></td>
<td><strong>20</strong></td>
<td></td>
</tr>
</tbody>
</table>
# SPONSOR EFFICIENCY

*The District will be evaluating your organizational reliance on Resort Tax revenues and your Program Expense Ratio.*

<table>
<thead>
<tr>
<th>Public Funding</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resort Tax</td>
<td>$385,000.00</td>
<td>$379,511.00</td>
<td>-1%</td>
<td>42%</td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
<td>#DIV/0!</td>
<td>0%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fundraising</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
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</thead>
<tbody>
<tr>
<td>Private Donations</td>
<td>#DIV/0!</td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corporate Donations &amp; Sponsorships</td>
<td>#DIV/0!</td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants</td>
<td>#DIV/0!</td>
<td>#DIV/0!</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Events</td>
<td>#DIV/0!</td>
<td>#DIV/0!</td>
<td>0%</td>
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</table>

<table>
<thead>
<tr>
<th>Direct Revenue</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dues, Fees, Memberships, Sales</td>
<td>$186,347.50</td>
<td>$136,945.00</td>
<td>-27%</td>
<td>15%</td>
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<tr>
<th>Other</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
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<tr>
<td>COVID-19 Relief*</td>
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<td>0%</td>
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<td></td>
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<tr>
<td>Other*</td>
<td>$516,794.50</td>
<td>$385,498.00</td>
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<td>43%</td>
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<th>TOTAL</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
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<tbody>
<tr>
<td></td>
<td>$1,088,142.00</td>
<td>$901,954.00</td>
<td>-17%</td>
<td>100%</td>
<td></td>
</tr>
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</table>

*Should total 100%*  

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>$650,679.00</td>
<td>$762,351.00</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Fundraising</td>
<td>#DIV/0!</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Programming</td>
<td>$353,957.00</td>
<td>$139,209.00</td>
<td>-61%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>TOTAL</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$1,004,636.00</td>
<td>$901,560.00</td>
<td>-10%</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

Other revenue includes the Visit Big Sky management fee reimbursed to the Big Sky Chamber for its FTE’s, including salaries, benefits and payroll taxes along with rent. When the budget for FY 21 was created, there were no funds allocated to COVID-19 relief because the budget was created in March 2020 when the effects of COVID were unknown.
# 3-YEAR GROWTH FORECAST

*(Include all organization projects and programs, not only those requesting resort tax funding)*

<table>
<thead>
<tr>
<th></th>
<th>Current 07/01/2020 - 06/30/2021</th>
<th>Year 2 07/01/2021 - 06/30/2022</th>
<th>Year 3 07/01/2022 - 06/30/2023</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employees</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total # of FTE</td>
<td>6.0</td>
<td>8.0</td>
<td>8.0</td>
</tr>
<tr>
<td><strong>Core Operations</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payroll &amp; Benefits</td>
<td>$637,601.00</td>
<td>$655,936.00</td>
<td>$701,850.00</td>
</tr>
<tr>
<td>Rent &amp; Mortgage</td>
<td>$27,000.00</td>
<td>$27,000.00</td>
<td>$27,000.00</td>
</tr>
<tr>
<td><strong>Total Forecasted Expenses</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Operating Budget (Including Core Operations)</td>
<td>$901,954.00</td>
<td>$972,511.00</td>
<td>$1,040,586.00</td>
</tr>
<tr>
<td>Capital Expenditures</td>
<td>$-$</td>
<td>$-$</td>
<td>$-$</td>
</tr>
<tr>
<td><strong>Assets</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reserves*</td>
<td>$586,390.00</td>
<td>$599,640.00</td>
<td>$619,790.00</td>
</tr>
</tbody>
</table>

Reserves are being held for the purchase of a permanent location for the Chamber to stabilize our yearly costs by acquiring a building with a fixed yearly mortgage.
Big Sky Chamber-FY22

Non-Profit FY22

Big Sky Chamber of Commerce
Katie Grice
Po Box 160100
88 Ousel Falls Road, Unit 1A
Big Sky, MT 59716
Lori@bigskychamber.com
O: 406-995-3606
M: 406-995-3000

Lori Wetzel
PO Box 160100
88 Ousel Falls Road, Unit A1
Big Sky, MT 59716
lori@bigskychamber.com
O: 406-995-3606
M: 406-696-1912
Application Form

Track Record (Goals and Outcomes)

Goals
What were the goals of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

Our Elevate Big Sky 2023 Strategic Plan outlines the goals of the Big Sky Chamber to 1) Advocate for our businesses as we Work to Become a Sustainable & Resilient Community; 2) Create a Positive Business Climate by Providing Transparency/Engagement; 3) Encourage Community Infrastructure and finally 4) Facilitate Local Governance. All the projects we sponsor and facilitate align with our strategic plan and all resort tax funded projects have met one or more of our goals.

Community Outcomes
What were the community outcomes of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

Projects that we have currently sponsored are: Semi-annual Eggs and Issues meeting held jointly with both the Madison and Gallatin County Commissioner’s meeting; Leadership Big Sky which builds tomorrow’s Big Sky Leaders who will be prepared to eventually take the reins and lead Big Sky into the future; sponsorship and participation in the coordinating council of Big Sky to align the major districts and community members along the same path, and participation in the BBER conference which produces a variety of economic and industry data including annual economic forecasts for the United States as well as Montana. All these projects have now become self-funded through private funding which opens the door for the Chamber to birth new projects to help maintain and grow the Big Sky community.

Revenue Reliance on Resort Tax (Financials)

The District uses the following information to evaluate your organization’s ability to plan and efficiently use funds.

Future Growth
Please explain any predicted 3-year growth including personnel, capital expenditures, operational expansions, and needs that require funding. Explain if you anticipate Resort Tax funds will support this growth.

The Big Sky Chamber serves our 400 members along with their thousands of employees as well as the community at large which requires qualified personnel to achieve the goals set forth in our Elevate 2023 Strategic Plan. The Chamber will have an ongoing need to fund personnel and operations into the future. The Chamber is in a state of transition, as we search for a new CEO to lead our organization, so future growth and expansion needs are not readily known at this time.

Future Projects
Other than the project(s) for this year are there any additional Resort Tax funding requests in FY23 (7/1/22-6/30/23) or FY24 (7/1/23-6/30/24)?

Yes
Future Projects Explanation
If yes, how much do you plan to request in FY23 and FY24? Also, please provide a brief explanation of any future projects.

The funding requests at this time for the Chamber for personnel and operations are projected to be $379,000 for FY 23 and $400,000 for FY24 to allow us to continue servicing our member businesses which is necessary for the economic sustainability of Big Sky. Our businesses cater to the recreational and personal needs of those persons traveling to our destination which is vital to maintaining the overall quality of life in our region. As our new CEO begins to learn more about the Chamber, our future requests may change as the community needs change. As our mission states: Our Community, Our Business.

COVID-19 Impact*
What has the impact of COVID-19 been on your operation and how has this impact affected your Resort Tax request?

The workload of the Big Sky Chamber staff has increased substantially across all positions. The need to operate differently in a virtual and often-times blended environment has resulted in the need to learn new technologies to adapt how we do business. The constant evolving landscape that is the U.S. economy due the impacts of a global pandemic require daily attention to be able to keep our member businesses informed, to provide them with the resources they need to continue to stay safe, open and strong, and to advocate as the voice of Big Sky business on issues that arise impacting them such as the advent of PPP Loans and eventual forgiveness which is ongoing. The Chamber has added new education classes to help our member businesses navigate the COVID19 rules and regulations for applying for COVID funding. Serving our businesses requires qualifies staffing which will be the major focus of our resort tax application.

Community Participation
The District uses the following information to evaluate if your organization has active community participation. Please provide annual counts to the best of your ability.

Engagement Strategy*
What plans do you have to expand community engagement and participation?

The Big Sky Chamber’s CEO moved to Arizona and a search is underway for a new CEO. Until a new CEO is found, expansion projects have been put on hold. The Chamber will continue to offer the same projects as in the past, Leadership Big Sky, Eggs and Issues, BBER sponsorship and the Community Building Forum to name a few. We are confident that our new leadership will not only continue to service our member businesses as in the past but will take the Chamber in new directions to benefit Big Sky.
MORNINGSTAR LEARNING CENTER (MLC)
$275,000 (2.98% of total requests)

2 Projects

Financial Sustainability

Revenue Distribution

- Current FY-Budgeted
  - Private Donations
  - Resort Tax, 10%
  - COVID-19 Relief*, 45%
  - Dues, Fees, Memberships, Sales, 40%
  - Corporate Donations & Sponsorships, 1%
  - Grants, 2%
  - Events, 1%

- Previous FY-Actual
  - Dues, Fees, Memberships, Sales, 76%
  - Resort Tax, 21%

Expense Distribution

- Current FY-Budgeted
  - Administration, 8%
  - Fundraising, 0%
  - Programming, 92%

- Previous FY-Actual
  - Administration, 8%
  - Fundraising, 0%
  - Programming, 92%

Award Trends

Future Project Requests

- FY23: $338,000
- FY24: $370,500

Forecasting Accuracy

- Projected FY22: $336,510
- Variance: $61,510 (-18.28%)

Annual Operating Budget Growth

- % Variance next year: +72.65%
- % Variance year after: +1.35%

Community Participation

- Volunteer Hours: 15
- Volunteers: 470
- Program Count: 4
- Program Participants: 50
- Event Count: 3
- Event Attendance: 50
- Number of Donors: 1
- Local Donation Amount: $1,500

Contract Compliance

Payment Requests: Timely & Accurate
Timely Responses: Responsive
Public Recognition of BSRAD: Unknown
Award Orientation Attendance: Yes

Track Record

Goals: This goal of this project (Tuition Assistance) supports MLC’s mission to provide accessible, affordable childcare and early childhood learning services in our community.

Accomplishments: This project reduced tuition for families who live and work in Big Sky at every income level, with a maximum of $13 off a day on their tuition rate.

Outcomes: With the help of the Resort Tax Tuition Reduction Project, MLC has remained affordable for 60-70 local families and allows them to enjoy the lifestyle that the Big Sky community has to offer.
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td>Low local donation amount</td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>10</td>
<td>Notable operation budget increase, great pro-</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>gramming to administration ratio</td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>25</td>
<td>25</td>
<td></td>
</tr>
</tbody>
</table>
## SPONSOR EFFICIENCY

The District will be evaluating your organizational reliance on Resort Tax revenues and your Program Expense Ratio.

<table>
<thead>
<tr>
<th>Revenue</th>
<th>July 1, 2020 - June 30, 2021</th>
<th>July 1, 2020 - June 30, 2021</th>
<th>% Change</th>
<th>% of total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Funding</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resort Tax</td>
<td>$186,255.00</td>
<td>$76,747.00</td>
<td>-54%</td>
<td>11%</td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
<td>$</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private Donations</td>
<td>$17,700.00</td>
<td>$10,700.00</td>
<td>-40%</td>
<td>1%</td>
</tr>
<tr>
<td>Corporate Donations &amp; Sponsorships</td>
<td>$</td>
<td>$10,329.96</td>
<td>#DIV/0!</td>
<td>1%</td>
</tr>
<tr>
<td>Grants</td>
<td>$</td>
<td>$17,070.00</td>
<td>#DIV/0!</td>
<td>2%</td>
</tr>
<tr>
<td>Events</td>
<td>$7,381.00</td>
<td>$4,950.00</td>
<td>-33%</td>
<td>1%</td>
</tr>
<tr>
<td>Direct Revenue</td>
<td>$610,193.00</td>
<td>$320,795.96</td>
<td>-47%</td>
<td>64%</td>
</tr>
<tr>
<td>Other</td>
<td>(168,255.00)</td>
<td>(76,747.00)</td>
<td>-54%</td>
<td>-11%</td>
</tr>
</tbody>
</table>

### 3-YEAR GROWTH FORECAST

- **Includes all organization projects and programs, not only those requesting resort tax funding**

<table>
<thead>
<tr>
<th>Current</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Operating Budget (Including Core Operations)</td>
<td>$657,210.00</td>
<td>$1,134,665.00</td>
</tr>
<tr>
<td>Payroll &amp; Benefits</td>
<td>$528,180.00</td>
<td>$1,004,643.95</td>
</tr>
<tr>
<td>Rent &amp; Mortgage</td>
<td>$21,312.00</td>
<td>$21,312.00</td>
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<tr>
<td>Capital Expenditures</td>
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<td></td>
</tr>
<tr>
<td>Assets</td>
<td>$27,853.00</td>
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### Employees

<table>
<thead>
<tr>
<th></th>
<th>July 1, 2020 - June 30, 2021</th>
<th>July 1, 2021 - June 30, 2022</th>
<th>July 1, 2022 - June 30, 2023</th>
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<tbody>
<tr>
<td>Total # of FTE</td>
<td>16.0</td>
<td>18.0</td>
<td>18.0</td>
</tr>
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</table>

**Reserves**

- **Purpose and intent of reserves including any restrictions**: $27,853.22 reserves are currently in a money market account and a savings in case we run out of operation or scholarship funds. A few years ago, we ran into a cash problem because we ran out of scholarship funds and used operation funds to continue to provide assistance to families. After we built up our cash reserves we created a savings fund to avoid a similar situation. As MLC transitions into the new Tuition Assistance Program, a larger operations budget, and increasing tuition, we feel it is extremely important to have a savings reserve. We hope to not use it but if we run out of Resort Tax scholarship program funds, then we can use the savings fund to continue to provide tuition assistance to families. Additionally in a couple years we plan to build employee housing and we can use these funds to help fund the project.

*Provide detail on other and COVID-19 Relief received, including sources and amounts*: MLC applied for the first and second off the PPP loan and to date have received $135,662.00. The first round of funds have been forgiven and we do not know if the second round will be forgiven or not. MLC applied for the Big Sky Relief Grant and we were awarded $226,052.21. As of mid-March, we have used 74,683.36 of the funds and we expect to reapply for the grant to continue an additional 6 months. We have budgeted to use an additional $72,000 of the funds in the 2021/2022 budget starting July 1, 2021.

*Other - The Resort Tax funds are used to reduce tuition to families, therefor it does not impact our budget.*
MLC- FY22

Non-Profit FY22

Morningstar Learning Center

Kelsey Hash
PO Box 160505
659 Spruce Cone Dr
Big Sky, MT 59716
executivedirector@morningstarlearningcenter.com
O: 406-995-2565
M: 507-829-4390

Kelsey Hash
PO Box 160505
659 Spruce Cone Dr.
Big Sky, MT 59716
executivedirector@morningstarlearningcenter.com
O: 406-995-2565
M: 507-829-4390
Application Form

**Track Record (Goals and Outcomes)**

**Goals**
What were the goals of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

Over the past three years Morningstar Learning Center (MLC) has used Big Sky Resort Tax for the MLC Tuition Reduction Project. This project reduced tuition for families who live and work in Big Sky at every income level, with a maximum of $13 off a day on their tuition rate. This goal of this project supports MLC’s mission to provide accessible, affordable childcare and early childhood learning services in our community. Funding from Resort Tax for this project historically has been a critical component to achieving MLC’s mission which has also helped to create a sustainable operation. MLC serves between 70-80 families annually who live and work in Big Sky. MLC is a state-licensed childcare facility with a daily maximum enrollment of 63 children ages 6 months-6 years. With affordable childcare, more families are able to work, live, and enjoy the Big Sky community.

**Community Outcomes**
What were the community outcomes of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

MLC’s goal is to provide accessible and affordable childcare to any family in the Big Sky community. In the past three years MLC has successfully achieved this goal by reaching maximum enrollment as our staffing allowed. Over 30 local businesses are represented by families utilizing MLC’s services. In a 2020 MLC Family Survey, 64% of respondents stated they would quit working and/or leave Big Sky if they couldn’t afford childcare, meaning approximately 19 businesses would be directly impacted. Additionally, 80% of respondents stated that MLC’s tuition rates were affordable with the help of the Resort Tax Tuition Project and any scholarship assistance from MLC’s Tuition Assistance Program. With the help of the Resort Tax Tuition Reduction Project, MLC has remained affordable for 60-70 local families and allows them to enjoy the lifestyle that the Big Sky community has to offer.

**Revenue Reliance on Resort Tax (Financials)**

The District uses the following information to evaluate your organization’s ability to plan and efficiently use funds.

**Future Growth**
Please explain any predicted 3-year growth including personnel, capital expenditures, operational expansions, and needs that require funding. Explain if you anticipate Resort Tax funds will support this growth.

MLC anticipates a growing community need for our services in the next three years. Plans that require additional funding include workforce housing and program expansion. MLC has acquired the lot next to its current facilities and intends to use this lot to meet growth needs. MLC will need funding to pay for architectural and engineering fees as well as hiring a General Contractor. With the help of Big Sky Relief, MLC has increased personnel costs to pay teachers competitively and added a necessary administration support position. This, combined with increased need for teachers as enrollment increases, will lead to personnel growth over the next 3 years. MLC will continue to work with community partners in ongoing needs assessments to determine programming expansion decisions and anticipates requesting funds from Resort Tax for these plans beginning in FY23.
**Future Projects**

Other than the project(s) for this year are there any additional Resort Tax funding requests in FY23 (7/1/22-6/30/23) or FY24 (7/1/23-6/30/24)?

Yes

**Future Projects Explanation**

If yes, how much do you plan to request in FY23 and FY24? Also, please provide a brief explanation of any future projects.

**FY23:**
- Tuition Assistance Program - $250,000. MLC will implement scheduled tuition increases over the next three years to close the budget deficit created by creating sustainable wages and benefits for staff. MLC anticipates this will increase the number and financial need of applicants for Tuition Assistance.

- Operational Budget - $68,000. In 2020-21 MLC received funds from Big Sky Relief to help create a sustainable operation. Funding was applied to creating competitive wages and an additional administrative position, creating a budget deficit. To reduce the deficit, MLC will implement scheduled tuition increases over the next three years.

- Workforce Housing Program - $20,000. MLC will begin the process of building workforce housing by hiring an architect and engineer for workforce housing plans.

**FY24:**
- Tuition Assistance Program - $250,000
- Operational Budget - $20,250
- Workforce Housing Program - $100,000

**COVID-19 Impact**

What has the impact of COVID-19 been on your operation and how has this impact affected your Resort Tax request?

COVID-19 has impacted Morningstar Learning Center significantly. Before COVID, MLC enrollment numbers were between 90-100% and now they are around 70%. MLC has remained open during the entire pandemic. During the Phase 1 shutdown, MLC kept its doors open to children of frontline and essential workers, dropping enrollment to 27%. Enrollment increased to 40% in May 2020, and MLC saw a steady increase in enrollment during the summer months, hovering around 50% capacity. MLC has struggled to keep staff during 2020, creating a cap in enrollment that prevented its facilities from maximizing their capacities. Additionally, MLC created flexible enrollment policies for families who were required to quarantine in an effort to be as accommodating as possible. This was another factor in MLC’s fluctuating enrollment numbers, therefore the enrollment projections for the Tuition Reduction project were not very accurate, leaving remaining funds.
**Community Participation**

The District uses the following information to evaluate if your organization has active community participation. Please provide annual counts to the best of your ability.

**Engagement Strategy**

What plans do you have to expand community engagement and participation?

This year MLC partnered with BSCO, BSSD 72, Discovery Academy, and the Chamber of Commerce to create and distribute a Community Youth Care and Program Needs Assessment and will use this information to guide programming decisions, both individually and collaboratively. Additionally, MLC works with WIA and this year, created a new relationship with the Big Sky Housing Trust. Finally, with an additional administrator, MLC will be able to enhance and expand community partnerships and programming.
ARTS COUNCIL OF BIG SKY (ACBS)

$215,000 (2.33% of total requests)

**Revenue Distribution**

- Current FY-Budgeted
  - COVID-19 Relief*, 5%
  - Other*, 1%
  - Resort Tax, 20%
  - Dues, Fees, Memberships, Sales, 14%
  - Grants, 11%
  - Private Donations, 34%
  - Corporate Donations & Sponsorships, 10%

**Financial Sustainability**

- Previous FY-Actual
  - COVID-19 Relief*, 1%
  - Resort Tax, 5%
  - Dues, Fees, Memberships, Sales, 14%
  - Events, 27%
  - Private Donations, 46%
  - Grants, 4%
  - Corporate Donations & Sponsorships, 3%

**Expense Distribution**

- Current FY-Budgeted
  - Fundraising, 0%
  - Administration, 18%
  - Programming, 82%

- Previous FY-Actual
  - Fundraising, 78%
  - Administration, 23%
  - Programming, 77%

**Award Trends**

- Future Project Requests
  - FY23: $215,000
  - FY24: $220,000
  - Plus an undetermined $ for public art installation

- Forecasting Accuracy
  - Projected FY22: $235,000
  - Variance: $20,000 (-8.51%)

- Annual Operating Budget Growth
  - % Variance next year: -4.21%
  - % Variance year after: +9.67%

**Community Participation**

- Volunteer Hours: 500
- Volunteers: 70
- Program Count: 40
- Program Participants: 1,500
- Event Count: 20
- Event Attendance: 36,000
- Number of Donors: 330
- Local Donation Amount: $362,000

**Track Record**

**Goals:** Offer free, high-quality entertainment to the resident and visitor community of Big Sky.

**Accomplishments:** Have achieved these goals as we continue to provide quality programming that attracts more and more people each year.

**Outcomes:** Increased visitation to events, promote ACBS, provide art classes, public art, workshops, education/outreach etc., and the concert series continues to grow.

**Contract Compliance**

- Payment Requests: Timely and organized
- Timely Responses: Responsive
- Public Recognition of BSRAD: Unknown
- Award Orientation Attendance: Yes
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td>Multiple well attended events</td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>10</td>
<td>Expense distribution on positive trajectory</td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td>Proactive communication around payment request schedule changes</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>25</td>
<td>25</td>
<td></td>
</tr>
</tbody>
</table>
### SPONSOR EFFICIENCY

The District will be evaluating your organizational reliance on Resort Tax revenues and your Program Expense Ratio.

**Previous Fiscal Year:** Recently completed Fiscal Year  
**Current Fiscal Year:** Fiscal Year as of 4/15/21

<table>
<thead>
<tr>
<th>Revenue (Cash only, do not include In-Kind)</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Public Funding</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resort Tax</td>
<td>$39,440.00</td>
<td>$205,800.00</td>
<td>422%</td>
<td>20%</td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
<td>$0</td>
<td>$0</td>
<td>#DIV/0!</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Fundraising</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private Donations</td>
<td>$342,715.00</td>
<td>$348,500.00</td>
<td>2%</td>
<td>34%</td>
</tr>
<tr>
<td>Corporate Donations &amp; Sponsorships</td>
<td>$20,232.00</td>
<td>$100,000.00</td>
<td>394%</td>
<td>10%</td>
</tr>
<tr>
<td>Grants</td>
<td>$29,750.00</td>
<td>$117,578.00</td>
<td>295%</td>
<td>11%</td>
</tr>
<tr>
<td>Events</td>
<td>$199,535.00</td>
<td>$145,000.00</td>
<td>-27%</td>
<td>14%</td>
</tr>
<tr>
<td><strong>Direct Revenue</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dues, Fees, Membership, Sales</td>
<td>$7,707.00</td>
<td>$44,050.00</td>
<td>472%</td>
<td>4%</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COVID-19 Relief*</td>
<td>$103,483.00</td>
<td>$48,822.00</td>
<td>-53%</td>
<td>5%</td>
</tr>
<tr>
<td>Other*</td>
<td>$7,500.00</td>
<td>$15,000.00</td>
<td>100%</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$750,362.00</td>
<td>$1,024,750.00</td>
<td>37%</td>
<td>100%</td>
</tr>
</tbody>
</table>

*Should total 100%

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Expenses Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>$116,964.00</td>
<td>$183,450.00</td>
<td>57%</td>
<td></td>
</tr>
<tr>
<td>Fundraising</td>
<td>$2,329.00</td>
<td>$4,100.00</td>
<td>76%</td>
<td></td>
</tr>
<tr>
<td>Programming</td>
<td>$393,574.00</td>
<td>$840,460.00</td>
<td>114%</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$512,867.00</td>
<td>$1,028,010.00</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

3-YEAR GROWTH FORECAST

(Include all organization projects and programs, not only those requesting resort tax funding)

<table>
<thead>
<tr>
<th>Employees</th>
<th>11/1/20 - 10/31/21</th>
<th>11/1/21 - 10/31/22</th>
<th>11/1/22 - 10/31/23</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll &amp; Benefits</td>
<td>$272,420.00</td>
<td>$340,000.00</td>
<td>$365,000.00</td>
</tr>
<tr>
<td>Rent &amp; Mortgage</td>
<td>$15,640.00</td>
<td>$21,640.00</td>
<td>$22,840.00</td>
</tr>
<tr>
<td><strong>Total Operating Budget (Including Core Operations)</strong></td>
<td>$1,028,010.00</td>
<td>$984,685.00</td>
<td>$1,079,885.00</td>
</tr>
<tr>
<td>Capital Expenditures</td>
<td>$242,000.00</td>
<td>$100,000.00</td>
<td>$100,000.00</td>
</tr>
<tr>
<td><strong>Reserves</strong></td>
<td>$70,138.00</td>
<td>$70,175.00</td>
<td>$80,000.00</td>
</tr>
</tbody>
</table>

*Provide detail on other and COVID-19 Relief received, including sources and amounts*: PPE #1: $26,300; Montana CARES: $75,165; Big Sky Relief: $2,018; Other income is an administrative transfer from one bank account to another (public art account to general operating) for program expenses/staff time.

**3-YEAR GROWTH FORECAST**

*Purpose and Intent of reserves including any restrictions*: Our reserves are for covering operating expenses in case of emergencies or if income is severely compromised. The COVID pandemic emphasized that we needed to increase our reserves. Reserves are not restricted, however.
ACBS-FY22

Non-Profit FY22

Arts Council of Big Sky

Brian Hurlbut  
PO Box 160308  
50 Meadow Village Drive, Suite 203  
Big Sky, MT 59716  
brian@bigskyarts.org  
O: 406-995-2742  
M: 406-209-0189

Brian Hurlbut  
PO Box 160308  
50 Meadow Village Drive, Suite 203  
Big Sky, MT 59716  
brian@bigskyarts.org  
O: 406-995-2742  
M: 406-209-0189
Application Form

**Track Record (Goals and Outcomes)**

**Goals**
What were the goals of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

Most of our Resort Tax funding in the last three years has gone toward our summer Music in the Mountains programming. The main goal of this project is to offer free, high-quality entertainment to the resident and visitor community of Big Sky. This type of cultural tourism project has several other goals associated with it, including supporting local artists; generating income for area businesses; adding to the cultural landscape of Big Sky; creating an event that fits in with Big Sky’s vision of a summer destination area; draw visitors from the surrounding area to Big Sky; and offering free programming to all sectors of the community. I believe that we have achieved these goals as we continue to provide quality programming that attracts more and more people each year.

**Community Outcomes**
What were the community outcomes of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

Our community outcomes included increased visitation for our events, which trickles down into more money being spent within the community. Another outcome is more awareness for the arts in Big Sky. Our concerts and events are not only great amenities to have, but they promote our organization and the other things we do: art classes, public art, workshops, education/outreach, etc. For example, by having our tent at the Farmers Market last summer we sold a record amount of merchandise and raised money to complete the purchase of the bison sculpture for the community. And by having our ARTventure activity tent set up we were able to promote our kids summer art classes and other activities. As for the concert series, it continues to grow and be recognized as the leading free music series in the state and people come from all over for the shows.

**Revenue Reliance on Resort Tax (Financials)**

The District uses the following information to evaluate your organization's ability to plan and efficiently use funds.

**Future Growth**
Please explain any predicted 3-year growth including personnel, capital expenditures, operational expansions, and needs that require funding. Explain if you anticipate Resort Tax funds will support this growth.

The Arts Council is a growing organization. In the fall of 2021, we received a three-year Murdock Foundation capacity building grant to hire an additional full-time employee (Event Coordinator). We also recently hired a part-time employee as a Development Assistant. We are planning on hiring a full-time Arts Educator when we move into the BASE center. Most of our current and upcoming capital expenditures are related to our Public Art program, as we are acquiring two substantial sculptures in 2021 and have plans for several more in the next three years. We don't anticipate asking Resort Tax to fund our operational expansions, but we will be asking Resort Tax to offer modest support for our large-scale Public Art Trail program which will start in earnest in 2022. We will continue to request annual Resort Tax funds to help offset the cost of our free summer programming, and occasional infrastructure needs for that specific program.
**Future Projects***

Other than the project(s) for this year are there any additional Resort Tax funding requests in FY23 (7/1/22-6/30/23) or FY24 (7/1/23-6/30/24)?

Yes

**Future Projects Explanation**

If yes, how much do you plan to request in FY23 and FY24? Also, please provide a brief explanation of any future projects.

We don’t have an exact dollar amount but we will be asking for some modest funding to support our Public Art Trail from the Big Sky Community Park to the Ousel Falls Trailhead. A big part of this is the mural project slated for the underground tunnel (part of the Tiger Grant). This will be a major community project that will be a cornerstone for our Public Art Program. We may also be asking for some infrastructure funding to repair/expand the stage in Len Hill Park. However, this is unknown at this point and we will continue to evaluate the needs after the new park is open this summer.

**COVID-19 Impact***

What has the impact of COVID-19 been on your operation and how has this impact affected your Resort Tax request?

The COVID-19 pandemic severely limited our offerings to the Big Sky community throughout 2020. We were unable to offer our signature Music in the Mountains program during the summer, and had to cancel our annual classical music festival and our Seattle ARTventure excursion. By not having the concerts we were also unable to offer our free ARTventure activity tent on Thursdays, but did offer them on Wednesdays at the Farmers Markets instead. Not having the concerts reduced our overall income, reach and impact to the community. We did offer additional classes and workshops, mostly online and geared toward local youth. We were able to complete a substantial public art acquisition in 2020 (the bison sculpture). Overall, however, the pandemic has not affected our current Resort Tax request as it is for the 2022 Music in the Mountains free concert series. At this time we anticipate no setbacks for the 2022 summer. Throughout 2020 we did receive supplemental COVID funding from various sources.

**Community Participation**

The District uses the following information to evaluate if your organization has active community participation. Please provide annual counts to the best of your ability.

**Engagement Strategy***

What plans do you have to expand community engagement and participation?

Many of our programs incorporate an outreach/engagement component. We are continually expanding our class and workshop offerings to the community, as well as our supplemental programming in our local schools. In December, 2021, we will move into the BASE center, where we will have our own dedicated arts classroom. This will substantially increase our program offerings to the community. Our office will also be in the BASE, so we will have greater visibility within the community.
WARREN MILLER PERFORMING ARTS CENTER (WMPAC)
$210,000 (2.28% of total requests)

Financial Sustainability

Revenue Distribution

- Current FY-Budgeted
  - COVID-19 Relief*, 12%
  - Dues, Fees, Memberships, Sales, 23%
  - Private Donations, 34%
  - Corporate Donations & Sponsorships, 7%
  - Other*, 8%

- Previous FY-Actual
  - Resort Tax, 23%
  - Dues, Fees, Memberships, Sales, 12%
  - Private Donations, 30%
  - Grants, 11%
  - Corporate Donations & Sponsorships, 9%
  - Other*, 11%

Expense Distribution

- Current FY-Budgeted
  - Administration, 16%
  - Programming, 76%
  - Fundraising, 8%

- Previous FY-Actual
  - Administration, 8%
  - Programming, 89%
  - Fundraising, 3%

Award Trends

Future Project Requests
- FY23: $225,000
- FY24: $250,000

Forecasting Accuracy
- Projected FY22: $215,000
- Variance: -$5,000 (-2.33%)

Annual Operating Budget Growth
- % Variance next year: +9.14%
- % Variance year after: +9.09%

Community Participation
- Volunteer Hours: 200
- Volunteers: 50
- Program Count: 12
- Program Participants: 675
- Event Count: 30
- Event Attendance: 10,000
- Number of Donors: 161
- Local Donation Amount: $259,430

Contract Compliance
Payment Requests: Timely & Accurate
Timely Responses: Responsive
Public Recognition of BSRAD: Yes
Award Orientation Attendance: Yes

Track Record
Goals: FY19: Present a full Winter and full Summer Season.
FY20: Expand Summer and Fall while strengthening the efficiency of our Flagship Winter Season. FY21: Survive COVID.

Accomplishments: Goals outlined above were accomplished.

Outcomes: WMPAC produces world-class and homegrown cultural events for our community. A WMPAC experience provides unique gatherings around performances that engage and delight our community, enhancing Big Sky as a better place to live and visit.
### SPONSOR SCORE

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td>Great event attendance, good local donation amount</td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>10</td>
<td>Good revenue distribution</td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td>Wonderful recognition of BSRAD support</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>25</strong></td>
<td><strong>25</strong></td>
<td></td>
</tr>
</tbody>
</table>
### Revenue (Cash only, do not include In-Kind)

<table>
<thead>
<tr>
<th>Public Funding</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resort Tax</td>
<td>$184,100.00</td>
<td>$150,000.00</td>
<td>-19%</td>
<td>23%</td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
<td>$2,250.00</td>
<td>$2,000.00</td>
<td>-11%</td>
<td>0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fundraising</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Donations</td>
<td>$213,500.00</td>
<td>$211,930.00</td>
<td>2%</td>
<td>34%</td>
</tr>
<tr>
<td>Corporate Donations &amp; Sponsorships</td>
<td>$62,500.00</td>
<td>$43,500.00</td>
<td>-30%</td>
<td>7%</td>
</tr>
<tr>
<td>Grants</td>
<td>$78,800.00</td>
<td>$62,541.00</td>
<td>-21%</td>
<td>10%</td>
</tr>
<tr>
<td>Events</td>
<td>$ -</td>
<td>$ -</td>
<td>#DIV/0!</td>
<td>0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Direct Revenue</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dues, Fees, Membership, Sales</td>
<td>$87,287.00</td>
<td>$38,210.00</td>
<td>-56%</td>
<td>6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>COVID-19 Relief*</td>
<td>$75,388.00</td>
<td>$75,388.00</td>
<td>#DIV/0!</td>
<td>12%</td>
</tr>
<tr>
<td>Other*</td>
<td>$75,790.00</td>
<td>$53,000.00</td>
<td>-30%</td>
<td>8%</td>
</tr>
</tbody>
</table>

| TOTAL | $704,227.00 | $640,569.00 | -9% | 100% |

*Should total 100%*

### Expenses

<table>
<thead>
<tr>
<th>Administration</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>$38,762.04</td>
<td>$86,441.16</td>
<td>123%</td>
<td></td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Fundraising</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>$40,763.56</td>
<td>$40,494.66</td>
<td>-1%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Programming</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>$619,559.66</td>
<td>$402,119.32</td>
<td>-35%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| TOTAL | $699,085.26 | $529,055.14 | -24% |

### 3-YEAR GROWTH FORECAST

(Include all organization projects and programs, not only those requesting resort tax funding)

<table>
<thead>
<tr>
<th>Employees</th>
<th>Total # of FTE</th>
<th>Current 5/1/21 - 4/30/22</th>
<th>Year 2 5/1/22 - 4/30/23</th>
<th>Year 3 5/1/21 - 4/30/22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Operations</td>
<td>2.0</td>
<td>2.5</td>
<td>2.5</td>
<td></td>
</tr>
</tbody>
</table>

| Payroll & Benefits | $153,940.80 | $200,000.00 | $206,000.00 |
| Rent & Mortgage | $ - | $ - | $ - |

<table>
<thead>
<tr>
<th>Total Operating Expenses</th>
<th>Total Operating Budget (Including Core Operations)</th>
<th>Year 2 5/1/22 - 4/30/23</th>
<th>Year 3 5/1/21 - 4/30/22</th>
</tr>
</thead>
<tbody>
<tr>
<td>$503,924.20</td>
<td>$550,000.00</td>
<td>$600,000.00</td>
<td></td>
</tr>
</tbody>
</table>

| Capital Expenditures | $50,000.00 | $35,000.00 | $35,000.00 |

| Assets | Reserves* | $175,000.00 | $125,000.00 | $150,000.00 |

*Purpose and intent of reserves including any restrictions*: This last year has taught us that having reserves is an important step in our evolution to maintain our presence and service promise in our community. Our reserves are divided into three funds, which we have been working hard to develop since our inception in 2013. The first is the future revenue shortfall fund, which currently sits at $50,000. This is in the event of an emergency situation in which an event went south or performed poorly, or in the case of this last year, we have to completely reinvent ourselves with the onset of a global pandemic. Since we have to enter into contracts with considerable risk each season (i.e. we really need the theater to be full), we need this buffer as we are still a relatively new organization in the field. The second fund is the Warren Miller Memorial fund of $50,000. When Warren passed away, his widow sent out a request for people to donate to WMPAC, and we are holding on to this fund in 2018 to engage them in exterior capital expenditures to honor his legacy. They cannot be spent on programming. The last is our project development fund of $75,000, which is used to develop projects that are 2 years or more on the horizon, experiment with new programming to serve previously underserved areas of our community, and to start building up a fund to transition to adding another full-time employee. This is an important part of our process to be a world-class arts institution in a small mountain town.
WMPAC-FY22

*Non-Profit FY22*

**Friends of Big Sky Education dba Warren Miller Performing Arts Center**

<table>
<thead>
<tr>
<th>John Zirkle</th>
<th><a href="mailto:john@warrenmillerpac.org">john@warrenmillerpac.org</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>45465 Gallatin Road</td>
<td>O: 406-995-6345</td>
</tr>
<tr>
<td>45465 Gallatin Road</td>
<td>M: 406-995-6345</td>
</tr>
<tr>
<td>Gallatin Gateway, MT 59730</td>
<td></td>
</tr>
</tbody>
</table>

**John Zirkle**

| 45465 Gallatin Road | johnzirkle@gmail.com |
| 45465 Gallatin Road | O: 406-580-3929 |
| Gallatin Gateway, MT 59730 | M: 406-995-6345 |
Application Form

**Track Record (Goals and Outcomes)**

**Goals**
What were the goals of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

- **FY19**: Present a full Winter and full Summer Season
  - WMPAC met its goals in FY19.

- **FY20**: Expand Summer and Fall while strengthening the efficiency of our Flagship Winter Season
  - Before COVID hit, FY20 was a banner year for WMPAC. We quintupled our PY participation in our 2019 Fall Season, greatly expanded participation and impact in our summer residencies, and increased single ticket revenue by 15% in our winter season without having to increase program expenses.

- **FY21**: Survive COVID
  - Throughout what is certain to be the worst year for the performing arts in the last century, and perhaps beyond, turned out to be the year where WMPAC was able to shine and show how resilient it can be in the face of adversity. Not only did we survive this year, but based on a study of 365 performing arts centers from every state in the US, WMPAC was NUMBER 1 in terms of events presented in hybrid capacity to our community in the Winter of COVID. We are happy to expand on this in our full application.

**Community Outcomes**
What were the community outcomes of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

- WMPAC produces world-class and homegrown cultural events for our community. A WMPAC experience provides unique gatherings around performances that engage and delight our community, enhancing Big Sky as a better place to live and visit. This last year, we reflected in depth on what engagement really means, and we look forward to expanding on that in our application. Here is the summary:

  **WMPAC Community Impact by the Numbers FY19 - FY21**

  - **FY19 WMPAC Goal**: 2688
  - **FY19 WMPAC Achieved**: 3269 (122% of Goal)
  - **FY19 Total Participation**: 7,294*

  - **FY20 Goal**: 3,840
  - **FY20 Achieved**: 4,454 (116% of goal)
  - **FY20 Total Participation**: 5,867*

  - **FY21 WMPAC Goal (75% of FY20 Actual)**: 3,340
  - **FY21 WMPAC Programming Achieved**: 6,297 (188% of goal)
  - **FY21 Total Participation**: 10,182*

*Includes non-WMPAC sponsored event participation. For audience tracking over the years of the COVID Pandemic, we shortened FY20 to July 1, 2019 - March 12, 2020. For FY21, we included programming between March 13, 2020 through June 30, 2021.
Revenue Reliance on Resort Tax (Financials)

The District uses the following information to evaluate your organization's ability to plan and efficiently use funds.

Future Growth*

Please explain any predicted 3-year growth including personnel, capital expenditures, operational expansions, and needs that require funding. Explain if you anticipate Resort Tax funds will support this growth.

We expend nominal growth in capital expenditures and operational expansions. This is on a year-to-year basis, but we do not expect anything major (outside of 5%) in the next three years in these areas. For personnel, we are starting to look at restructuring of our management. Currently we have no full-time employees; only three part-time employees (Executive Director included in this), and we are looking to better position ourselves with two full-time employees in either FY23 or FY24. For FY23 and FY24, we do not anticipate Resort Tax dollars to cover personnel. As has been the case in the past, we ask Resort Tax to primarily fund programmatic expenses through artist fees, and year-to-year capital expenses on a much smaller level.

Future Projects*

Other than the project(s) for this year are there any additional Resort Tax funding requests in FY23 (7/1/22-6/30/23) or FY24 (7/1/23-6/30/24)?

Yes

Future Projects Explanation

If yes, how much do you plan to request in FY23 and FY24? Also, please provide a brief explanation of any future projects.

Similar to years past, we will be requesting funds to support mostly annual artist fees for ongoing programming, as well as minor capital expenses as they arise, particularly in the ever-growing needs for technology.

FY23 Request Projection: $225,000
FY24 Request Projection: $250,000

COVID-19 Impact*

What has the impact of COVID-19 been on your operation and how has this impact affected your Resort Tax request?

Despite vaccinations rolling out across the country at an aggressive pace, the COVID-19 pandemic continues to wreak havoc in the performing arts sector. Broadway remains closed. National context is important to understand why WMPAC's operation has been affected. According to Americans for the Arts, nearly 500 million seats have gone unfilled. So, in this last year, not only has it been a struggle to serve audiences, which we have done brilliantly with our virtual access and myriad creative approaches to distancing, we have also been forced to CREATE the art on almost every program. These shows aren't on tour, like in normal years. Indeed, we have invented nearly every program from the last year. Nevertheless, we have persisted and succeeded while keeping audiences and artists safe, and we are proud to say that while yes our operations have been greatly affected by the pandemic, our FY22 resort tax request this year is quite normal, compared to previous years.
Community Participation

The District uses the following information to evaluate if your organization has active community participation. Please provide annual counts to the best of your ability.

Engagement Strategy*

What plans do you have to expand community engagement and participation?

Note that the above statistics do not include in-kind donors, which add up to over $50,000 value each year through lodging, transportation, food, and other typical hard costs in an operation. We do not include the value of volunteer hours in our in-kind calculations.

While yes, we are always expanding, we believe that we are well supported in the community, and we continue to expand community engagement through on the ground outreach, differentiated programming, and broader community support.
THE POST OFFICE, LLC (POLLC)
$131,000 (1.42% of total requests)

Financial Sustainability

Revenue Distribution

- Current FY-Budgeted
  - Resort Tax, 16%
  - COVID-19 Relief* - PPP Forgiveness, 10%
  - Other* - USPS Contact, 74%

- Previous FY-Actual
  - Resort Tax, 17%
  - Other* - USPS Contact, 83%

Expense Distribution

- Current FY-Budgeted
  - Fundraising, 0%
  - Administration, 0%
  - Programming, 100%

- Previous FY-Actual
  - Fundraising, 0%
  - Administration, 0%
  - Programming, 100%

Award Trends

Future Project Requests
FY23: $148,000  FY24: $169,000

Forecasting Accuracy
Projected FY22: $103,000
Variance: +$28,000 (+27.18%)

Annual Operating Budget Growth
% Variance next year: +5.78%
% Variance year after: +5.05%

Community Participation
- Volunteer Hours: 0
- Volunteers: 0
- Program Count: 1
- Program Participants: 3,161

Contract Compliance
Payment Requests: Accurate & Timely
Timely Responses: Responsive
Public Recognition of BSRAD: Unknown
Award Orientation Attendance: Yes

Track Record
Goals: Our first annual goal was to operate the Big Sky Post Office in an efficient manner, relocating to a larger facility, annexing the canyon, or converting to a federally operated Post Office.

Accomplishments: I believe we have been extremely successful in this endeavor, we have had minimal success working with the United States Postal Service ("USPS") with our second goal.

Outcomes: In each of the past three years, the Big Sky Post Office was able to operate under budget while providing postal services to the Big Sky community. Only the unique challenge of COVID forced POLLC to reduce retail hours for a brief period from May - July in 2020.
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>25</td>
<td>25</td>
<td></td>
</tr>
</tbody>
</table>
## SPONSOR EFFICIENCY

The District will be evaluating your organizational reliance on Resort Tax revenues and your Program Expense Ratio.

<table>
<thead>
<tr>
<th>Previous Fiscal Year: Recently completed Fiscal Year</th>
<th>Dates of Sponsors Current Fiscal Year: 1/1/21-12/31/21</th>
</tr>
</thead>
</table>

### Revenue (Cash only, do not include In-Kind)

#### Public Funding
- **Resort Tax**: $64,297.00 - $69,000.00, 7% increase
- **Other (IE Mill levies, County, State)**: $ - $ -
- **Private Donations**: $ - $ -
- **Corporate Donations & Sponsorships**: $ - $ -
- **Grants**: $ - $ -
- **Events**: $ - $ -

#### Fundraising
- **Dues, Fees, Membership, Sales**: $ - $ -
- **COVID-19 Relief* - PPP Forgiveness**: $44,100.00 - #DIV/0!
- **Other* - USPS Contact**: $317,500.00 - $317,500.00, 74% increase

**Total Revenue**
- **Direct Revenue**: $381,797.00 - $430,600.00, 13% increase
- **Other**: #DIV/0!

**Total Forecasted Revenue**
- **Direct Revenue**: 381,797.00 - 430,600.00, 13% increase
- **Other**: #DIV/0!

*Should total 100%*

### Expenses

#### Administration
- **Payroll & Benefits**: $306,023.00 - $323,778.00 - $342,602.00

#### Programming
- **Payroll & Benefits**: $57,504.00 - $59,900.00 - $59,900.00

**Total Operating Budget (Including Core Operations)**
- **Payroll & Benefits**: $430,600.00 - $455,600.00 - $478,500.00

**Capital Expenditures**
- **Reserves***: $ - $ - $ -

### Employees Total # of FTE
- **1/1/2021-12/31/2021**: 5.8
- **1/1/2022 - 12/31/2022**: 6.0
- **1/1/2023 - 12/31/2023**: 6.5

### 3-YEAR GROWTH FORECAST

(Include all organization projects and programs, not only those requesting resort tax funding)

#### Core Operations
- **Payroll & Benefits**: $306,023.00 - $323,778.00 - $342,602.00

#### Rent & Mortgage
- **Payroll & Benefits**: $57,504.00 - $59,900.00 - $59,900.00

**Total Forecasted Capital Expenditures**
- **Reserves***: $ - $ - $ -

*Purpose and intent of reserves including any restrictions*:

In March 2021, POLLC was informed that it's full request for PPP loan forgiveness was approved.
POLLC-FY22

Non-Profit FY22

The Post Office, LLC

Al Malinowski  al_mal@yahoo.com
PO Box 160189  O: 406-995-2850
55 Meadow Village Drive, Unit #1  M: 406-995-2850
Big Sky, MT 59716

Al Malinowski
PO Box 160189  al_mal@yahoo.com
55 Meadow Village Drive, Unit #1  O: 406-995-2850
Big Sky, MT 59716  M: 406-995-2850
Application Form

Track Record (Goals and Outcomes)

Goals*
What were the goals of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

Our first annual goal was to operate the Big Sky Post Office in an efficient manner. I believe we have been extremely successful in this endeavor, especially considering the climate of the past year. We are fortunate to have several loyal community members on our staff who are also very hard-working individuals.

We have had minimal success working with the United States Postal Service ("USPS") with our second goal of relocating to a larger facility, annexing the canyon, or converting to a federally operated Post Office. While the last year has been even more difficult, historically is has been challenging to get the USPS to acknowledge the limited resources we are given to service the Big Sky community.

Community Outcomes*
What were the community outcomes of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

In each of the past three years, the Big Sky Post Office was able to operate under budget while providing postal services to the Big Sky community. Only the unique challenge of COVID forced POLLC to reduce retail hours for a brief period from May -July in 2020.

Revenue Reliance on Resort Tax (Financials)

The District uses the following information to evaluate your organization's ability to plan and efficiently use funds.

Future Growth*
Please explain any predicted 3-year growth including personnel, capital expenditures, operational expansions, and needs that require funding. Explain if you anticipate Resort Tax funds will support this growth.

As the Big Sky community continues to grow, the staffing needs of the Big Sky Post Office will likely continue to grow. Should the operation be relocated to a larger facility, the cost to operate that new facility will logically increase accordingly. Those costs increases cannot be estimated at this time.

Given our inability to generate enough leverage to convince the USPS to fund the entire current cost of post office operations in Big Sky, it is doubtful that the USPS will be willing to fund the full cost of operating a larger facility. However I do believe the USPS will recognize the responsibility to fund some portion of that increased cost. I expect that to expedite any changes to the current status, the Resort Tax funds will be necessary.

Future Projects*
Other than the project(s) for this year are there any additional Resort Tax funding requests in FY23 (7/1/22-6/30/23) or FY24 (7/1/23-6/30/24)?

Yes
Future Projects Explanation
If yes, how much do you plan to request in FY23 and FY24? Also, please provide a brief explanation of any future projects.

I expect that any operator of the Big Sky Post Office will need to request future funding. The preliminary estimates based on operating in the current facility are provided in the budget attachments.

COVID-19 Impact*
What has the impact of COVID-19 been on your operation and how has this impact affected your Resort Tax request?

COVID-19 has had a dramatic impact on our operation. First, our ability to provide consistently adequate staffing has been difficult. Initially the challenge was losing a key team member with no notice. This forced us to shorten our retail hours during the week, giving us time to hire and train new staff who could assist with the operations that occur prior to the retail desk opening.

Our second wave of challenge came from employees or their family members contracting COVID. We had to regularly react to losing employees for unexpected time periods due to positive test results or required quarantines.

Added to those staffing shortages was an unanticipated rise in mail volume, especially in the off-season. More customers in the Big Sky community who were relying more frequently on mail service to receive much needed medications and supplies caused this challenge.

On a positive note, POLLC did receive a PPP loan in April 2020 and learned the entire loan was forgiven in March 2021.

Community Participation
The District uses the following information to evaluate if your organization has active community participation. Please provide annual counts to the best of your ability.

Engagement Strategy*
What plans do you have to expand community engagement and participation?

For our operations, community engagement and participation already expands to the entire community.
Financial Sustainability

Revenue Distribution
Current FY-Budgeted
- Dues, Fees, Memberships, Sales, 64%
- Private Donations, 13%
- Other*, 6%

Previous FY-Actual
- Dues, Fees, Memberships, Sales, 64%
- Private Donations, 17%
- Other*, 9%
- Grants, 3%
- Events, 7%

Expense Distribution
Current FY-Budgeted
- Administration, 10%
- Fundraising, 1%

Previous FY-Actual
- Administration, 9%
- Fundraising, 0%

Award Trends

Future Project Requests
- FY23: $95,681.82
- FY24: $99,030.68

Forecasting Accuracy
- Projected FY22: $50,000
- Variance: +42,446 (+84.89%)%

Annual Operating Budget Growth
- % Variance next year: +10.0%
- % Variance year after: +20.0%

Community Participation
- Volunteer Hours: 50
- Event Count: 5
- Volunteers: 50
- Event Attendance: 150
- Program Count: 7
- Number of Donors: 90
- Program Participants: 300
- Local Donation Amount: $40,000

Contract Compliance
- Payment Requests: Accurate and Timely
- Timely Responses: Responsive
- Public Recognition of BSRAD: Unknown
- Award Orientation Attendance: Yes

Track Record

Goals: The goal is provide accessible tuition to working families in Big Sky.

Accomplishments: This goal was achieved as our enrollment increased/reached capacity and we had the ability to support those families who seek these childcare options so that no one is turned away for an inability to pay. We offer targeted, need-based, tuition assistance.

Outcomes: Create programming that is accessible and affordable, and to support any local families who seek school choice, after school programs, holiday and summer programming through scholarships and tuition assistance. This Early Childhood program supports the workforce and adds resiliency and sustainability to our community by adding year-round quality childcare services through a Montessori approach.
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>0</td>
<td>Notable operating budget growth. Sponsor Efficiency worksheet did not include Resort Tax Revenue.</td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>25</td>
<td>15</td>
<td></td>
</tr>
</tbody>
</table>
## SPONSOR EFFICIENCY

The District will be evaluating your organizational reliance on Resort Tax revenues and your Program Expense Ratio.

<table>
<thead>
<tr>
<th>Public Funding</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resort Tax</td>
<td>$157,000.00</td>
<td>$132,800.00</td>
<td>-10%</td>
<td>1.3%</td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
<td>#DIV/0!</td>
<td>#DIV/0!</td>
<td>0%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Revenue (Cash only, do not include In-Kind)</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Donations</td>
<td>$30,000.00</td>
<td>-</td>
<td>-100%</td>
<td>0%</td>
</tr>
<tr>
<td>Corporate Donations &amp; Sponsorships</td>
<td>#DIV/0!</td>
<td>-</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Grants</td>
<td>$62,500.00</td>
<td>-</td>
<td>-100%</td>
<td>0%</td>
</tr>
<tr>
<td>Events</td>
<td>$574,250.00</td>
<td>$807,482.00</td>
<td>41%</td>
<td>80%</td>
</tr>
</tbody>
</table>

Direct Revenue:
- Dues, Fees, Memberships, Sales: $574,250.00 - $807,482.00, -19% 6%

<table>
<thead>
<tr>
<th>Other</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>COVID-19 Relief*</td>
<td>$78,000.00</td>
<td>$63,500.00</td>
<td>-19%</td>
<td>6%</td>
</tr>
<tr>
<td>Other*</td>
<td>#DIV/0!</td>
<td>#DIV/0!</td>
<td>0%</td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL**: $901,750.00 - $1,003,782.00, -11% 100%

*Should total 100%

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Current</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>$96,056.00</td>
<td>$99,485.00</td>
<td>4%</td>
</tr>
<tr>
<td>Fundraising</td>
<td>$3,889.00</td>
<td>$5,000.00</td>
<td>29%</td>
</tr>
<tr>
<td>Programming</td>
<td>$921,218.00</td>
<td>$890,362.00</td>
<td>-3%</td>
</tr>
</tbody>
</table>

**TOTAL**: $1,021,163.00 - $994,847.00, -3% 100%

*Provide detail on other and COVID-19 Relief received, including sources and amounts*:

**3-YEAR GROWTH FORECAST**

(Include all organization projects and programs, not only those requesting resort tax funding)

<table>
<thead>
<tr>
<th>Employees</th>
<th>Current (8/1/2020 - 7/31/2021)</th>
<th>Year 2 (8/1/2021 - 7/31/2022)</th>
<th>Year 3 (8/1/2022 - 7/31/2023)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total # of FTE</td>
<td>13.0</td>
<td>15.0</td>
<td>17.0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Core Operations</th>
<th>Current (8/1/2020 - 7/31/2021)</th>
<th>Year 2 (8/1/2021 - 7/31/2022)</th>
<th>Year 3 (8/1/2022 - 7/31/2023)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll &amp; Benefits</td>
<td>$601,547.00</td>
<td>$661,701.70</td>
<td>$794,042.04</td>
</tr>
<tr>
<td>Rent &amp; Mortgage</td>
<td>$100,000.00</td>
<td>$110,000.00</td>
<td>$150,000.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Forecasted Expenses</th>
<th>Current (8/1/2020 - 7/31/2021)</th>
<th>Year 2 (8/1/2021 - 7/31/2022)</th>
<th>Year 3 (8/1/2022 - 7/31/2023)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Operating Budget (Including Core Operations)</td>
<td>$994,847.00</td>
<td>$1,094,331.70</td>
<td>$1,313,198.04</td>
</tr>
<tr>
<td>Capital Expenditures</td>
<td>$140,000.00</td>
<td>$160,000.00</td>
<td>$200,000.00</td>
</tr>
</tbody>
</table>

*Purpose and Intent of reserves including any restrictions*: Reserves are in place to cover for any budget discrepancies
Hannah Richardson
Big Sky Discovery Academy and Community Learning Center

BSDA-FY22

Non-Profit FY22

Big Sky Discovery Academy and Community Learning Center
Nettie Breuner admin@bigskydiscoveryacademy.org
PO Box 161548 0: 406-993-2008
Big Sky, MT 59716 M: 406-539-2382

Hannah Richardson
P.O. Box 161548 hannahr@bigskydiscoveryacademy.org
175 Asp 0: 406-993-2008
Big Sky, MT 59716 M: 301-471-1087
Application Form

Track Record (Goals and Outcomes)

Goals*
What were the goals of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

In the last three years, the Montessori Early Childhood Program has applied to Resort Tax for tuition assistance. The goal is provide accessible tuition to working families in Big Sky. This goal was achieved as our enrollment increased/reached capacity and we had the ability to support those families who seek these childcare options so that no one is turned away for an inability to pay. We offer targeted, need-based, tuition assistance.

Community Outcomes*
What were the community outcomes of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

The Montessori Early Childhood Program at Discovery Academy is one of two preschool programs offered in Big Sky. Thus, it is an integral program in our local community. As a nonprofit, we work diligently to create programming that is accessible and affordable, and to support any local families who seek school choice, after school programs, holiday and summer programming through scholarships and tuition assistance. This Early Childhood program supports the workforce and adds resiliency and sustainability to our community by adding year-round quality childcare services through a Montessori approach.

Revenue Reliance on Resort Tax (Financials)
The District uses the following information to evaluate your organization’s ability to plan and efficiently use funds.

Future Growth*
Please explain any predicted 3-year growth including personnel, capital expenditures, operational expansions, and needs that require funding. Explain if you anticipate Resort Tax funds will support this growth.

We anticipate growth in FTE as we reach maximum student enrollment/capacity in our current space. As the Community earning Center (CLC) programs grow, so will PTE, adding additional offerings for all sectors. School and program growth leads to more volunteers (guest speakers, parent volunteers, free programs). BSRAD currently supports preschool tuition assistance. This funding is integral to our ability to offer one of the two preschool programs in Big Sky and to offer affordable and quality early childhood education. We may also seek future funds for CLC programs, which will support growth in our personnel and in our community participation/outreach.

Future Projects*
Other than the project(s) for this year are there any additional Resort Tax funding requests in FY23 (7/1/22-6/30/23) or FY24 (7/1/23-6/30/24)?

Yes
Future Projects Explanation
If yes, how much do you plan to request in FY23 and FY24? Also, please provide a brief explanation of any future projects.

Our forecasted Resort Tax request for Early Childhood tuition assistance in FY23 is $94,760.00 and in FY24 the forecasted request is $98,000.

COVID-19 Impact*
What has the impact of COVID-19 been on your operation and how has this impact affected your Resort Tax request?

The increased demands on childcare/education programs due to COVID and all related challenges have increased roles, responsibilities and hours for leadership staff. That said, we are requesting additional funds to support the increased demands on work responsibilities of our Lower School Program Director for this school year, due to continuing to provide childcare solutions for early childhood students and their families in Big Sky.

Community Participation
The District uses the following information to evaluate if your organization has active community participation. Please provide annual counts to the best of your ability.

Engagement Strategy*
What plans do you have to expand community engagement and participation?

The Montessori Early Childhood program plans to continue to offer year-round programming for local 3-5 year old students. This summer the Early Childhood program is offering 9 weeks of Summer Enrichment for Big Sky Youth. Through community partnerships and
FRIENDS OF BIG SKY COMMUNITY LIBRARY (FOL)

$87,825 (0.95% of total requests)

**Financial Sustainability**

**Revenue Distribution**
- Current FY-Budgeted
  - Resort Tax, 72%
  - Dues, Fees, Memberships, Sales, 9%
  - Grants, 3%
  - Private Donations, 4%
  - Other*, 13%

**Previous FY-Actual**
- Resort Tax, 80%
- Dues, Fees, Memberships, Sales, 7%
- Grants, 3%
- Private Donations, 5%
- Events, 3%
- Other*, 1%

**Expense Distribution**
- Current FY-Budgeted
  - Administration, 83%
  - Programming, 17%

**Previous FY-Actual**
- Administration, 82%
- Programming, 18%
- Fundraising, 0%

**Award Trends**

**Future Project Requests**
- FY23: $93,459
- FY24: $93,172

**Forecasting Accuracy**
- Projected FY22: $87,920
- Variance: -$95 (-0.11%)

**Annual Operating Budget Growth**
- % Variance next year: -2.34%
- % Variance year after: +3.00%

**Community Participation**
- Volunteer Hours: 250
- Volunteers: 30
- Program Count: 2
- Program Participants: 1,000

**Track Record**

**Goals:**
- Expand public relations
- Increase on-line resources

**Accomplishments:** Not provided by sponsor.

**Outcomes:**
- More library cards issued
- Increased on-line database users, outreach to Discovery Academy
- Virtual summer reading program
- “One Book Big Sky” program.

**Contract Compliance**

Payment Requests: Timely, accuracy has improved in last year
Timely Responses: Responsive
Public Recognition of BSRAD: Unknown
Award Orientation Attendance: Yes
## SPONSOR SCORE

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>0</td>
<td>72% reliance on Resort Tax, high administration to programming ratio, very little fundraising revenue and no fundraising expenses</td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>25</td>
<td>15</td>
<td></td>
</tr>
</tbody>
</table>
### SPONSOR EFFICIENCY

The District will be evaluating your organizational reliance on Resort Tax revenues and your Program Expense Ratio.

#### Public Funding

<table>
<thead>
<tr>
<th>Revenue (Cash only, do not include In-Kind)</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resort Tax</td>
<td>$ 80,718.00</td>
<td>$ 80,720.00</td>
<td>0%</td>
<td>72%</td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
<td>#DIV/0!</td>
<td>0%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Fundraising

<table>
<thead>
<tr>
<th>Fundraising</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Donations</td>
<td>$ 4,645.00</td>
<td>$ 4,000.00</td>
<td>-14%</td>
<td>4%</td>
</tr>
<tr>
<td>Corporate Donations &amp; Sponsorships</td>
<td>#DIV/0!</td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants</td>
<td>$ 3,500.00</td>
<td>$ 3,400.00</td>
<td>-3%</td>
<td>3%</td>
</tr>
<tr>
<td>Events</td>
<td>$ 3,313.60</td>
<td>#DIV/0!</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Direct Revenue

<table>
<thead>
<tr>
<th>Direct Revenue</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dues, Fees, Memberships, Sr</td>
<td>$ 7,489.60</td>
<td>$ 10,100.00</td>
<td>35%</td>
<td>9%</td>
</tr>
</tbody>
</table>

#### Other

<table>
<thead>
<tr>
<th>Other</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>COVID-19 Relief*</td>
<td>#DIV/0!</td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other*</td>
<td>$ 1,109.46</td>
<td>$ 14,190.00</td>
<td>1179%</td>
<td>13%</td>
</tr>
</tbody>
</table>

**TOTAL**:

<table>
<thead>
<tr>
<th>Revenue</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>100,775.66$</td>
<td>$ 112,410.00</td>
<td>12%</td>
<td>100%</td>
<td></td>
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</tbody>
</table>

*Should total 100%

*Other Revenue Includes reappropriated cash, Interest income and Reimbursed Expenses.

### 3-YEAR GROWTH FORECAST

(Include all organization projects and programs, not only those requesting resort tax funding)

<table>
<thead>
<tr>
<th>Employees</th>
<th>Total # of FTE</th>
<th>Year 1</th>
<th>Current</th>
<th>Year 2</th>
<th>Current</th>
<th>Year 3</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/01/2020 - 06/30/2021</td>
<td>1.1</td>
<td>1.0</td>
<td>1.0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/01/2021 - 06/30/2022</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/01/2022 - 06/30/2023</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Core Operations</th>
<th>Payroll &amp; Benefits</th>
<th>07/01/2020 - 06/30/2021</th>
<th>07/01/2021 - 06/30/2022</th>
<th>07/01/2022 - 06/30/2023</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$ 57,910.00</td>
<td>$ 49,200.00</td>
<td>$ 50,676.00</td>
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</table>

<table>
<thead>
<tr>
<th>Core Operations</th>
<th>Rent &amp; Mortgage</th>
<th>07/01/2020 - 06/30/2021</th>
<th>07/01/2021 - 06/30/2022</th>
<th>07/01/2022 - 06/30/2023</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$ 5,000.00</td>
<td>$ 5,000.00</td>
<td>$ 5,150.00</td>
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<table>
<thead>
<tr>
<th>Total Forecasted Expenses</th>
<th>Total Operating Budget (Including Core Operations)</th>
<th>07/01/2020 - 06/30/2021</th>
<th>07/01/2021 - 06/30/2022</th>
<th>07/01/2022 - 06/30/2023</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$ 32,800.00</td>
<td>$ 32,034.00</td>
<td>$ 32,995.02</td>
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<table>
<thead>
<tr>
<th>Capital Expenditures</th>
<th>07/01/2020 - 06/30/2021</th>
<th>07/01/2021 - 06/30/2022</th>
<th>07/01/2022 - 06/30/2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ 16,700.00</td>
<td>$ 19,500.00</td>
<td>$ 23,085.02</td>
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<table>
<thead>
<tr>
<th>Assets</th>
<th>Reserves*</th>
<th>07/01/2020 - 06/30/2021</th>
<th>07/01/2021 - 06/30/2022</th>
<th>07/01/2022 - 06/30/2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ 60,000.00</td>
<td>$ 60,000.00</td>
<td>$ 60,000.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Purpose and intent of reserves including any restrictions*: Unrestricted Reserve covers co-insurance in the event of a major disaster.
FOL-FY22

Non-Profit FY22

Friends of the Big Sky Community Library

Kay Reeves
PO Box 161344
45465 Gallatin Road
59730
Big Sky, MT 59716

librarian@bigskylibrary.com
O: 406-995-4281 x2
M: 406-995-4281 x2

Kay Reeves
PO Box 161344
Big Sky, MT 59716

librarian@bigskylibrary.com
O: 406-995-4281 x2
M: 406-995-4281 x2
Track Record (Goals and Outcomes)

Goals*
What were the goals of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

a. Expand Public Relations:
   • A Facebook page and an Instagram profile has been created
   • A newsletter has been developed and is emailed monthly
   • Redesigned Website
   • Discovery Academy Outreach
   • 1000 Books program expanded to Morningstar
   • Local News Articles
   • "Food for the Brain" Book distribution continues with the Food Bank

b. Increase on-line resources:
   • E-book/audiobook collections increased from 100 to 400
   • Added Kanopy movie subscription for free streaming access to over 30,000 movies and documentaries
   • Added an on-line subscription to New York Times that patrons can easily access
   • Purchased a subscription to a Rosetta Stone database for on-line learning. Patrons have access to learning over 30 different languages
      All these are measured by reports for usage data.

Community Outcomes*
What were the community outcomes of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

Community Outcomes
• The Library saw a significant increase in library cards issued this past year.
• Our on-line databases continue to increase in users
• We continue to do a community outreach to Discovery Academy, providing library story hour for their Kindergarten
• A virtual Summer Reading Program (SRP) for the community was held this past summer and plans for an on-site SRP are in the works for this summer June 22nd-July 30th called “Tails and Tales”
• We were able to hold the “One Book Big Sky” program with Jamie Ford and his book " Love and Other Consolation Prizes” in September with a socially distanced crowd.
• Our winter “One Book Big Sky” program with author Kristine McMorris and her book “Sold on a Monday” is scheduled for June 22nd.
• Even through our COVID year, I felt the Community Library board and staff have achieved the goals and outcomes set for the year and we will continue to work on outreach in our community.

Revenue Reliance on Resort Tax (Financials)
The District uses the following information to evaluate your organization's ability to plan and efficiently use funds.
**Future Growth**

Please explain any predicted 3-year growth including personnel, capital expenditures, operational expansions, and needs that require funding. Explain if you anticipate Resort Tax funds will support this growth.

As we see our community continue to grow, we see a potential increase in personnel and/or hours. We expect we will continue to expand our online services and continue to grow our inventory. Future Capital Expenditures may include updating our furniture including a book drop in FY 22 and the purchase of 2 new chairs and a coffee table in FY 23.

**Future Projects**

Other than the project(s) for this year are there any additional Resort Tax funding requests in FY23 (7/1/22-6/30/23) or FY24 (7/1/23-6/30/24)?

Yes

**Future Projects Explanation**

If yes, how much do you plan to request in FY23 and FY24? Also, please provide a brief explanation of any future projects.

Since Resort Tax funds a portion of our operating budget, we expect we will have to continue to request funds for FY 23 and FY 24.

We estimate approximately $3000 will be requested in FY23 for the purchase of 2 new chairs and a coffee table.

**COVID-19 Impact**

What has the impact of COVID-19 been on your operation and how has this impact affected your Resort Tax request?

The biggest impact COVID had on our operation was not returning to our full time hours. We were hoping to open this past summer with two staff members for 20 hours a week and due to COVID we had limited hours and limited visitors (6 at a time). Also, our fundraising has been affected. We were unable to sell books at the Farmers Market or at the Scholastic Book Fair as it was cancelled. During our COVID closure we did not charge overdue fines.

**Community Participation**

The District uses the following information to evaluate if your organization has active community participation. Please provide annual counts to the best of your ability.

**Engagement Strategy**

What plans do you have to expand community engagement and participation?

- Community outreach and public relations
- “How to” videos are being developed to teach patrons how to download an OverDrive ebook or audiobook to a personal device, how to log on to Rosetta Stone and how to access the catalog. These will be posted on the website for easy use.
- Summer reading programs will be available for all ages
  “One Book Big Sky” book will be chosen (2 reads)
- Weekly and annual used book sales
- Library presence in BASE
- Storytime
- Online periodicals
- iPads available
BIG SKY SKATING & HOCKEY ASSOCIATION (BSSHA)

$19,695 (0.85% of total requests)

Community Participation
- Volunteer Hours: 1,188
- Volunteers: 42
- Program Count: 6
- Program Participants: 3,000

Volunteer Hours: 1,188
Volunteers: 42
Program Count: 6
Program Participants: 3,000

Financial Sustainability

Revenue Distribution
Previous FY-Actual

Expense Distribution
Current FY-Budgeted

Future Project Requests
FY23: $75,500
FY24: $42,000
Unsure on when additional capital purchases ($35,500) may happen.

Forecasting Accuracy
Projected FY22: -$77,000
Variance: -$1,780 (-2.31%)

Award Trends

Annual Operating Budget Growth
% Variance next year: -15.90%
% Variance year after: 0%

Contract Compliance
Payment Requests: Accurate & Timely
Timely Responses: Responsive
Public Recognition of BSRAD: Yes
Award Orientation Attendance: Yes

Track Record
Goals: Provide Big Sky with a properly maintained, quality ice rink in Big Sky with related programs. Expand program participation. To purchase and then operate a refrigeration system for our seasonal rink. Replace our ancient Zamboni. Make our organization more sustainable long-term.

Accomplishments: All goals outlined above have been accomplished.

Outcomes: Our overall Community Goal has been (1) to provide a quality, recreational opportunity for those who visit, work, or live in the Big Sky Community; (2) make the Community more affordable by providing a low cost recreational option for local families and visitors, and (3) encourage increased participation by having a quality ice surface and excellent programs.
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td>Great attendance and volunteer numbers</td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>5</td>
<td>47% reliance on Resort Tax</td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>25</strong></td>
<td><strong>20</strong></td>
<td></td>
</tr>
</tbody>
</table>
### SPONSOR EFFICIENCY

The District will be evaluating your organizational reliance on Resort Tax revenues and your Program Expense Ratio.

<table>
<thead>
<tr>
<th>Revenue (Cash only, do not include In-Kind)</th>
<th>Previous Fiscal Year: Recently completed Fiscal Year</th>
<th>Current Fiscal Year: Fiscal Year as of 4/15/21</th>
<th>Dates of Sponsors Current Fiscal Year: 07/01/20 to 06/30/21</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Public Funding</strong></td>
<td>Previous FY-Actual</td>
<td>Current FY-Budgeted</td>
<td>% Change</td>
</tr>
<tr>
<td>Resort Tax</td>
<td>$42,052.00</td>
<td>$67,300.00</td>
<td>60% 47%</td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
<td>$6,000.00</td>
<td>$13,000.00</td>
<td>9%</td>
</tr>
<tr>
<td><strong>Fundraising</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private Donations</td>
<td>$36,650.00</td>
<td>$5,000.00</td>
<td>-86% 4%</td>
</tr>
<tr>
<td>Corporate Donations &amp; Sponsorships</td>
<td>$20,000.00</td>
<td>$15,000.00</td>
<td>-28% 11%</td>
</tr>
<tr>
<td>Grants</td>
<td>$49,179.00</td>
<td>$15,000.00</td>
<td>-69% 11%</td>
</tr>
<tr>
<td>Events</td>
<td>$5,889.00</td>
<td>$5,000.00</td>
<td>-15% 4%</td>
</tr>
<tr>
<td><strong>Direct Revenue</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dues, Fees, Membership, Sales</td>
<td>$12,913.00</td>
<td>$22,350.00</td>
<td>73% 16%</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COVID-19 Relief*</td>
<td>$1,516.00</td>
<td>$1,421.00</td>
<td>-6%</td>
</tr>
<tr>
<td>Other*</td>
<td>$79,129.00</td>
<td>$102,562.00</td>
<td>30%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$167,683.00</td>
<td>$142,650.00</td>
<td>-15% 100%</td>
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</table>

*Should total 100%

### Expenses

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Current FY (7/1/20 to 6/30/21)</th>
<th>Year 2 (7/1/21 to 6/30/22)</th>
<th>Year 3 (7/1/22 to 6/30/23)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Administration</strong></td>
<td>$1,516.00</td>
<td>$1,421.00</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td><strong>Fundraising</strong></td>
<td>$79,129.00</td>
<td>$102,562.00</td>
<td>30%</td>
</tr>
<tr>
<td><strong>Programming</strong></td>
<td>$500.00</td>
<td>$500.00</td>
<td>$500.00</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$80,645.00</td>
<td>$103,983.00</td>
<td>29%</td>
</tr>
</tbody>
</table>

*Provide detail on other and COVID-19 Relief received, including sources and amounts*

### 3-YEAR GROWTH FORECAST

(Include all organization projects and programs, not only those requesting resort tax funding)

<table>
<thead>
<tr>
<th>Employees</th>
<th>Core Operations</th>
<th>Programming</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total # of FTE</td>
<td>Payroll &amp; Benefits</td>
<td>$500.00</td>
</tr>
<tr>
<td></td>
<td>Rent &amp; Mortgage</td>
<td>$500.00</td>
</tr>
<tr>
<td>Total Forecasted Expenses</td>
<td>Total Operating Budget (Including Core Operations)</td>
<td>$103,983</td>
</tr>
<tr>
<td>Total Operating Budget (Including Core Operations)</td>
<td>Core Operations</td>
<td>$87,450.00</td>
</tr>
<tr>
<td>Capital Expenditures</td>
<td>$87,450.00</td>
<td></td>
</tr>
<tr>
<td>Assets</td>
<td>Reserves*</td>
<td>$118,059.00</td>
</tr>
</tbody>
</table>

*Provide detail on other and COVID-19 Relief received, including sources and amounts*

### Purpose and Intent of reserves including any restrictions:

- **Our reserves have multiple purposes.** First, we need to have enough money to keep our rink operating each season despite unanticipated cash needs from time-to-time. This can include unanticipated repairs (e.g. we spent $27880 to restore a sound enclosure BSCO had us tear down because of their construction and $14K to move a power line), variations in funds raised (e.g. we believe COVID caused us to lose 15 corporate & foundation sponsors), equipment which unexpectedly needs to be replaced, and unexpectedly higher operation costs (e.g. contract labor). Second, we are accumulating funds to pay (either in whole or in part) for special projects which will improve our rink and its efficiency (e.g. replacing our current lights with LED lights, installing a curtain system to reduce the effects of the sun, etc.) Third, we need to accumulate reserves which, over time, will fund major repairs or replacement of rink improvements and equipment which have a finite life (e.g. dasher boards, our Zamboni, our chiller, etc.). If depreciation, as a non-cash expense, is supposed to create a replacement reserve, and our accumulated depreciation is $191,607, it is arguable that our current cash reserves need to be increased. It is certainly possible that some of our major rink improvements will last longer than projected by our depreciation schedule, but we do think that prudent financial management requires us to continue to increase our current reserves over time.
# BSSHA--FY 22

*Non-Profit FY22*

## Big Sky Skating & Hockey Association, Inc.

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ryan Blechta</td>
<td><a href="mailto:gary59716@gmail.com">gary59716@gmail.com</a></td>
<td>O: 216-408-4085</td>
</tr>
<tr>
<td>P.O. Box 160406</td>
<td></td>
<td>M: 406-999-0040</td>
</tr>
<tr>
<td>Big Sky</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Big Sky, MT 59716</td>
<td></td>
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</tbody>
</table>

## Gary Hermann

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>P.O. Box 160406</td>
<td><a href="mailto:gary59716@gmail.com">gary59716@gmail.com</a></td>
<td>O: 216-408-4085</td>
</tr>
<tr>
<td>P.O. Box 160406</td>
<td></td>
<td>M: 406-995-3127</td>
</tr>
<tr>
<td>Big Sky, MT 59716</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Application Form

Track Record (Goals and Outcomes)

Goals*
What were the goals of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

#1: FY 19, 20, 21- Provide Big Sky with a properly maintained, quality ice rink in Big Sky with related programs. That goal was achieved each year.

#2 FY 19, 20, 21- Expand program participation. This was achieved each year. Each year, our curling program sold out and we've added numbers to our youth hockey programs (40 to 50 to 65 this year). Two years ago, we created a 3 on 3 hockey program for adults and have averaged 13 teams (each with six players) per year.

#3 FY 19, 20, 21--To purchase and then operate a refrigeration system for our seasonal rink. In FY 19 we completed the necessary fundraising to add a refrigeration system, which we now operate.

#4 FY19--Replace our ancient Zamboni. With help from Resort Tax, we replaced it with a newer Zamboni.

#5 FYI 19, 20, 21 Make our organization more sustainable long-term. We have increased our donor base, implemented measures to reduce costs, and added to our financial reserve..

Community Outcomes*
What were the community outcomes of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

Our overall Community Goal has been (1) to provide a quality, recreational opportunity for those who visit, work, or live in the Big Sky Community; (2) make the Community more affordable by providing a low cost recreational option for local families and visitors, and (3) encourage increased participation by having a quality ice surface and excellent programs. We have achieved each of these Community related objectives/outcomes for FY 19, 20, and 21. Specifically, we do not charge for open skating or pick-up hockey, although we encourage donations. Our children’s hockey programs have very modest fees and we have removed a major obstacle to participation by providing skates and equipment to participants in our youth hockey programs at no charge. Broomball fees are kept low because most participants are seasonal employees. These low fees are supported by higher fees for participants in our curling program, which sells out, in part because most teams are sponsored by local businesses.

Revenue Reliance on Resort Tax (Financials)
The District uses the following information to evaluate your organization's ability to plan and efficiently use funds.
**Future Growth**
Please explain any predicted 3-year growth including personnel, capital expenditures, operational expansions, and needs that require funding. Explain if you anticipate Resort Tax funds will support this growth.

This is unclear since the BSSHA could be merged into the Big Sky Community Organization prior to FY 23. If there is no merger, we anticipate that future fund requests will be to help the BSSHA (or their successor) with operational expenses (most refrigerated ice rinks throughout the U.S., including municipal rinks, require subsidies) and a few equipment purchases which will enhance operating efficiency. We do not believe we will be adding much, if any, personnel for rink operations or operations. Aside from inflation, we are hoping to limit operating deficits by controlling or limiting costs in certain areas (e.g. energy, storage, and rental equipment) and increasing revenues from programming and events. As a result, we hope that Resort Tax District's subsidy in future years will be a smaller percentage of our operating costs than now. See "Future Projects Explanation" for capital projects which we believe make sense to improve safety and lower energy costs.

**Future Projects**
Other than the project(s) for this year are there any additional Resort Tax funding requests in FY23 (7/1/22-6/30/23) or FY24 (7/1/23-6/30/24)?

Yes

**Future Projects Explanation**
If yes, how much do you plan to request in FY23 and FY24? Also, please provide a brief explanation of any future projects.

This is unclear at this time because of a possible merger of the BSSHA into the BSCO. We believe, however, that either the BSSHA or their possible successor (the BSCO) should strongly consider several medium-sized capital projects during FY 23 and/or FY 24: (1) The purchase of a shade cloth system which is designed to save energy costs by reducing the effect of the sun on the ice for our rink (estimated cost: $25,000) and (2) to change our current overhead lighting to energy-saving LED lighting (approximate cost of $10,500). These projects are intended to reduce energy costs and thereby reduce the extent of future operating subsidies.

**COVID-19 Impact**
What has the impact of COVID-19 been on your operation and how has this impact affected your Resort Tax request?

The main impact has been that 15 businesses who sponsored us in the past were unable to do so this year. Also, several foundations which have provided us with significant support in the past were unable to help us this year. Fortunately, we were able to make up this by obtaining a few special grants, including one from the State of Montana, by obtaining a few new donors, and by persuading a few of our supporters to make special contributions to help us through a difficult period. As a result, COVID has not impacted our current request. On the positive side, we do believe that COVID may have contributed to an increased number of people participating in our programs and using our rink. We believe that our outdoor rink provided a safe, open-air, mostly socially distanced activity where participants could feel safe relative to possible COVID exposure.
Community Participation

The District uses the following information to evaluate if your organization has active community participation. Please provide annual counts to the best of your ability.

Engagement Strategy

What plans do you have to expand community engagement and participation?

Most local participation comes from word-of-mouth, driven by quality programs, although we do advertise in the Big Sky local newspapers, and post rack cards in hotels and other lodging places. Our curling programs sell out every year, which means we can only expand participation if our ice is available long enough to have two seasons. Since participants in our broomball league are mostly temporary employees, we promote that program through people affiliated with the Resort and the Clubs.
Community Participation

- Volunteer Hours: 418
- Volunteers: 125
- Program Count: 23
- Program Participants: 207
- Event Count: 4
- Event Attendance: 113
- Number of Donors: 83
- Local Donation Amount: $70,000

Contract Compliance

Payment Requests: Timely & Accurate
Timely Responses: Responsive
Public Recognition of BSRAD: Yes
Award Orientation Attendance: Yes

Future Project Requests
FY23: $94,690  FY24: $100,800

Financial Sustainability

Revenue Distribution

<table>
<thead>
<tr>
<th>Current FY-Budgeted</th>
<th>Previous FY-Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants, 40%</td>
<td>Grants, 40%</td>
</tr>
<tr>
<td>Resort Tax, 32%</td>
<td>Resort Tax, 34%</td>
</tr>
<tr>
<td>Private Donations, 2%</td>
<td>Private Donations, 6%</td>
</tr>
</tbody>
</table>

Expense Distribution

<table>
<thead>
<tr>
<th>Current FY-Budgeted</th>
<th>Previous FY-Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration, 11%</td>
<td>Administration, 12%</td>
</tr>
<tr>
<td>Fundraising, 1%</td>
<td>Fundraising, 3%</td>
</tr>
<tr>
<td>Programming, 88%</td>
<td>Programming, 85%</td>
</tr>
</tbody>
</table>

Award Trends

Future Operating Budget Growth

% Variance next year: +39.11%
% Variance year after: +22.81%

Forecasting Accuracy

Projected FY22: $65,000
Variance: +$10,220 (+15.72%)

Track Record

Goals: Implement the organization’s mission. Assist and educate the public, facilitate ecologically based invasive species management on private and public lands, and facilitate early detection/rapid response for new invaders.

Accomplishments: The Alliance has been successful in achieving our goals despite funding reductions and associated COVID impacts. Please review our Annual Report provided to the Resort Tax board for details on accomplishments.

Outcomes: Secured $86,967 for programs, $143,248 of in-kind support, and fundraised $14,062. 5.3 million billboard views, 8.2 print media views, 7 trailhead signs, 4 canyon signs, 1,706 kids, 263 adults in 12 classes, 12 community events. Built 4 gardens, 46 volunteers, 270 hours, 6 partners, $20,991 matched funds, 3,057 pounds, 168 volunteers, 405 volunteer hours, 447 acres treated, $31,286 matched funds, 54 volunteers, 497 pounds collected, $13,671 value to HOA, 103 properties, 577 acres inspected. Eliminated leafy spurge, alerted community of new invaders.

BSRAD SPONSOR BINDER
Page 118 of 138
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td>Excellent volunteer and event participation</td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>10</td>
<td>Sponsor thoughtfully reduced FY21 request due to COVID, significant operating budget growth</td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>25</strong></td>
<td><strong>25</strong></td>
<td></td>
</tr>
</tbody>
</table>
### SPONSOR EFFICIENCY

The District will be evaluating your organizational reliance on Resort Tax revenues and your Program Expense Ratio.

<table>
<thead>
<tr>
<th>Revenue</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Funding</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resort Tax</td>
<td>$50,000</td>
<td>$26,068</td>
<td>-48%</td>
<td>32%</td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
<td>#DIV/0!</td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fundraising</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private Donations</td>
<td>$5,580.00</td>
<td>$2,000.00</td>
<td>-64%</td>
<td>2%</td>
</tr>
<tr>
<td>Corporate Donations &amp; Sponsorships</td>
<td>#DIV/0!</td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants</td>
<td>$37,189</td>
<td>$53,882.00</td>
<td>45%</td>
<td>66%</td>
</tr>
<tr>
<td>Events</td>
<td>#DIV/0!</td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Revenue</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dues, Fees, Membership, Sales</td>
<td>$311</td>
<td>-100%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COVID-19 Relief*</td>
<td>#DIV/0!</td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other*</td>
<td>#DIV/0!</td>
<td>0%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| **TOTAL** | $93,080.00 | $81,950.00 | -12% | 100% | *Should total 100%

| Expenses | | | | |
| Administration | $12,333.00 | $9,043.00 | -27% | |
| Fundraising | $3,015.00 | $575.00 | -81% | |
| Programming | $87,197.00 | $72,332.00 | -17% | |
| **TOTAL** | $102,545.00 | $81,950.00 | -20% | |

*Provide detail on other and COVID-19 Relief received, including sources and amounts*:  
*COVID-19 Relief funds: As funds did not exist at the time of budgeting, none were accounted for in the budget. The Alliance received the following in 2020:  
$1,000 from SBA EIDL loan 4-28-20  
$10,000 from the first round of State of Montana COVID relief for non-profits on 8-27-20  
$14,000 from round 2 of State of Montana COVID relief for non-profits on 10-28-20  
All funds ($25,000) were utilized by 12-31-20 as per contractual requirements.  
**The additional expenses went to the building of our native demonstration garden at Crail Ranch.

### 3-YEAR GROWTH FORECAST

(Include all organization projects and programs, not only those requesting resort tax funding)

<table>
<thead>
<tr>
<th>Employees</th>
<th>Current 07/01/20 - 06/30/21</th>
<th>Year 2 07/01/21 - 06/30/22</th>
<th>Year 3 07/01/22 - 06/30/23</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Operations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total # of FTE**</td>
<td>0.2</td>
<td>0.6</td>
<td>0.8</td>
</tr>
<tr>
<td>Payroll &amp; Benefits***</td>
<td>$20,000.00</td>
<td>$55,000.00</td>
<td>$80,000.00</td>
</tr>
<tr>
<td>Rent &amp; Mortgage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Forecasted Expenses</td>
<td>Total Operating Budget (Including Core Operations)</td>
<td>$81,950.00</td>
<td>$140,000.00</td>
</tr>
<tr>
<td>Capital Expenditures</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assets</td>
<td>Reserves*</td>
<td>$18,682.00</td>
<td>$15,000.00</td>
</tr>
</tbody>
</table>

*Provide detail on other and COVID-19 Relief received, including sources and amounts*:  
*COVID-19 Relief funds: As funds did not exist at the time of budgeting, none were accounted for in the budget. The Alliance received the following in 2020:  
$1,000 from SBA EIDL loan 4-28-20  
$10,000 from the first round of State of Montana COVID relief for non-profits on 8-27-20  
$14,000 from round 2 of State of Montana COVID relief for non-profits on 10-28-20  
All funds ($25,000) were utilized by 12-31-20 as per contractual requirements.  
**The additional expenses went to the building of our native demonstration garden at Crail Ranch.

**Purpose and intent of reserves including any restrictions**:  
*Unrestricted funds total $18,682. Projected Reserves (by 6-31-21) total $7,682, as $11,000 is expected to cover contracted staff and program funding shortages for the time period of January-June 2021.  
**The Alliance does not have paid employees, but a contractor. The contractor receives no benefits and must cover all payroll tax liabilities.  
***The 2020-2021 budget was based on “survival mode” and had $20,000 for contracted staff. As the Alliance was able to secure COVID relief funds and additional unrestricted funds from local foundations, the actual amount is closer to $50,000.
GALLATIN INVASIVE SPECIES ALLIANCE

Jennifer Mohler
903 N Black
903 N Black
Bozeman, MT 59715

info@gallatinisa.org
O: 406-209-0905
M: 406-209-0905

JENNIFFER MOHLER

903 N Black
903 N Black
Bozeman, MT 59714

jen@gallatinisa.org
O: 406-209-0905
M: 406-209-0905
Application Form

Track Record (Goals and Outcomes)

Goals*
What were the goals of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

Administration Goals: Implement the organization's mission, identify and pursue funding opportunities, adhere to Generally Accepted Accounting Practices, and execute a fundraising program to build community support.

Education & Outreach Goals: Assist and educate the public, inspire the community, and advocate for conservation practices that maintain ecological and economic health of the community.

Environmental Stewardship Goals: Facilitate ecologically based invasive species management on private and public lands, improve impaired wildlife habitat, provide landowners with resources to implement best management practices, and facilitate early detection/rapid response for new invaders.

The Alliance has been successful in achieving our goals despite funding reductions and associated COVID impacts. Please review our Annual Report provided to the Resort Tax board for details on accomplishments.

Community Outcomes*
What were the community outcomes of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

Admin: Adhered to Generally Accepted Accounting Practices, executed grant requirements, secured $86,967 for programs, $143,248 of in-kind support, and fundraised $14,062.

Education & Outreach
1. Clean Recreation: 5.3 million billboard views, 8.2 print media views, 7 trailhead signs, 4 canyon signs
2. Communications & PR: Updated website, and produced e-news, articles, and other printed materials.
3. Community Ed: 1,706 kids, 263 adults in 12 classes, 12 community events
4. Crail Gardens: Built 4 gardens, 46 volunteers, 270 hours

Environmental Stewardship Program:
1. Bighorn Sheep: 6 partners, $20,991 matched funds
2. Weed Pulls: 3,057 pounds, 168 volunteers, 405 volunteer hours
3. Conserve Our Canyon: 447 acres treated, $31,286 matched funds
4. HOA (Habitat Owners Assoc.): 54 volunteers, 497 pounds collected, $13,671 value to HOA
5. Landowner Assistance: 103 properties, 577 acres inspected
6. Map/Monitoring: Eliminated leafy spurge, alerted community of new invaders


**Revenue Reliance on Resort Tax (Financials)**

The District uses the following information to evaluate your organization's ability to plan and efficiently use funds.

**Future Growth**

Please explain any predicted 3-year growth including personnel, capital expenditures, operational expansions, and needs that require funding. Explain if you anticipate Resort Tax funds will support this growth.

The Alliance’s goal is to secure funding to sustain our contracted staff at ½ FTE this coming year, and increase to ¾ FTE the next. This will allow us to meet the demand for our services while addressing the increasing threats to our natural resources.

Years of explosive growth and growing impacts to our natural resources have far outmatched funding. This undermines effective implementation. I.e., outreach to landowners in not sustained due to funding insecurity, reducing overall efficacy. In 2020, property inspections increased by 415% over the previous year, and without COVID relief funding from the state we would not have been able to aid those seeking it. Such projects cannot reach full potential and yield maximum results without predictability.

Our request to Resort Tax mirrors both growth and demand to ensure the sustainability of our natural resources, the economic engine of our community.

**Future Projects**

Other than the project(s) for this year are there any additional Resort Tax funding requests in FY23 (7/1/22-6/30/23) or FY24 (7/1/23-6/30/24)?

Yes

**Future Projects Explanation**

If yes, how much do you plan to request in FY23 and FY24? Also, please provide a brief explanation of any future projects.

The Alliance anticipates requests for future funding for our 3 projects to be consistent with the current request while accounting for inflationary impacts. There is no source other than Resort Tax that will provide the baseline funding required for the Alliance’s community services and conservation efforts that are focused on protecting the economic engine (i.e., natural resources) of Big Sky.

Lack of a consistent funding stream makes planning and implementation of projects exceedingly difficult, i.e., we are unable to advertise our services to landowners and HOAs if we are unsure we will have the funding to assist them. Our Education and Outreach and Environmental Stewardship projects require steady and ongoing investments to yield results.

The Alliance has a proven track record of building partnerships, leveraging funds, and achieving results despite a limited and inconsistent budget. Our overall weighted match of RT funds is better than 1:10.

**COVID-19 Impact**

What has the impact of COVID-19 been on your operation and how has this impact affected your Resort Tax request?
Because our FY21 ask to Resort Tax was proactively reduced, plans and projects were severely affected, and efforts shifted to “survival mode” and focused on pursuit of alternative funding.

Funding cuts meant the Alliance did not attend the Big Sky Farmers Market. Annual events and classes were canceled, resulting in fewer outreach opportunities. Requests for property inspections skyrocketed 415% over the previous year, from 20 to 83.

The impact of COVID further highlighted that funding insecurity leaves the Alliance in a reactive position vs a proactive one. Conservation does not just happen; it is a commitment made by the collective and requires a long-term vision and ongoing investment to yield results. Success is achieved with a disciplined, proactive, and committed effort that is sustained through both good times and pandemic times.

Now more than ever, as we turn to the outdoors for respite and relief, we are reminded of how important our natural resources are.

---

**Community Participation**

The District uses the following information to evaluate if your organization has active community participation. Please provide annual counts to the best of your ability.

**Engagement Strategy**

What plans do you have to expand community engagement and participation?

Return to the Farmers Market, host native plant sale & “Bag the Peak” cornhole tournament fundraisers and kick off “Grow Wild” (plant native for water & wildlife conservation).

We reduced our 2020 grant proactively, and now invite support to meet demand and match the threat to our natural resources.

From those we have helped: “The Alliance is such a valuable resource. Their help has let us become more...educated in how to address invasive species on our property and in the neighborhood.”
Community Participation

- Volunteer Hours: 5,000
- Volunteers: 280
- Program Count: 16
- Program Participants: 290

Financial Sustainability

**Revenue Distribution**

<table>
<thead>
<tr>
<th>Source</th>
<th>Current FY-Budgeted</th>
<th>Previous FY-Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Donations &amp; Sponsorships, 8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants, 3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other* Fundraising, 36%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Events, 21%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dues, Fees, Memberships, Sales, 34%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Expense Distribution**

- Administration: 6%
- Fundraising: 15%
- Programming: 85%

**Award Trends**

- Fiscal Year: 2001 to 2021
- District Award Trend vs. BSSEF Award Trend

**Future Project Requests**

- FY23: $20,000
- FY24: $20,000

**Forecasting Accuracy**

Sponsor did not apply last year.

**Annual Operating Budget Growth**

- % Variance next year: +2.55%
- % Variance year after: +2.50%

**Contract Compliance**

Information not available as BSSEF has not applied for funding in several years

**Track Record**

**Goals**: Information not available as BSSEF has not applied for funding in several years

**Accomplishments**: Information not available as BSSEF has not applied for funding in several years

**Outcomes**: Information not available as BSSEF has not applied for funding in several years
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td>Great event attendance and volunteer numbers</td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>10</td>
<td>Resort Tax has not been a source of funds consistently, respectable operating budget growth</td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>25</strong></td>
<td><strong>25</strong></td>
<td></td>
</tr>
</tbody>
</table>
### Previous Fiscal Year: Recently completed Fiscal Year

**Current Fiscal Year: Fiscal Year as of 4/15/21**

<table>
<thead>
<tr>
<th>Public Funding</th>
<th>Revenue (Cash only, do not include In-Kind)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resort Tax</td>
<td>Current FY-Actual $1.00</td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
<td>$ -</td>
</tr>
<tr>
<td>Private Donations</td>
<td>Current FY $486.00</td>
</tr>
<tr>
<td>Corporate Donations &amp; Sponsorships</td>
<td>Current FY $48,000.00</td>
</tr>
<tr>
<td>Grants</td>
<td>Current FY $25,000.00</td>
</tr>
<tr>
<td>Events</td>
<td>Current FY $103,769.77</td>
</tr>
<tr>
<td>Direct Revenue</td>
<td>Dues, Fees, Memberships, Sales $261,245.76</td>
</tr>
<tr>
<td>Other</td>
<td>COVID-19 Relief*</td>
</tr>
<tr>
<td>Other* Fundraising</td>
<td>Current FY $177,306.24</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$625,808.77</strong></td>
</tr>
</tbody>
</table>

**Direct Revenue**

- Dues, Fees, Memberships, Sales: $261,245.76
- COVID-19 Relief*: $10,000.00
- Other* Fundraising: $177,306.24

**3-YEAR GROWTH FORECAST**

(Include all organization projects and programs, not only those requesting resort tax funding)

<table>
<thead>
<tr>
<th>Current</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current (*please enter your fiscal year dates)</td>
<td>Year 2 (*please enter your fiscal year dates)</td>
<td>Year 3 (*please enter your fiscal year dates)</td>
</tr>
<tr>
<td>Employees Total # of FTE</td>
<td>4.0</td>
<td>6.0</td>
</tr>
<tr>
<td>Core Operations</td>
<td>Payroll &amp; Benefits $394,333.00</td>
<td>$520,000.00</td>
</tr>
<tr>
<td>Rent &amp; Mortgage</td>
<td>$35,000.00</td>
<td>$35,000.00</td>
</tr>
<tr>
<td>Total Forecasted Expenses</td>
<td>Total Operating Budget (Including Core Operations) $780,100.00</td>
<td>$800,000.00</td>
</tr>
<tr>
<td>Capital Expenditures</td>
<td>$10,000.00</td>
<td>$80,000.00</td>
</tr>
<tr>
<td>Assets Reserves*</td>
<td>$150,000.00</td>
<td>$200,000.00</td>
</tr>
</tbody>
</table>

*Purpose and intent of reserves including any restrictions*: BSSEF is in the process of securing a self sustainable scholarship fund.
Big Sky Ski Education Foundation

Jeremy Ueland
PO Box 160134
78 Meadow Village Drive, Suite E
Big Sky, MT 59716

info@bssef.com
O: 406-993-2773
M: 406-579-7005

Jeremy Ueland
PO Box 160134
78 Meadow Village Drive, Suite E
Big Sky, MT 59716

bigskysef@yahoo.com
O: 406-579-7005
M: 406-579-7005
Application Form

Track Record (Goals and Outcomes)

Goals*
What were the goals of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

There has been no ask since 2016-2017 Resort Tax Funding.

Community Outcomes*
What were the community outcomes of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

There has been no ask since 2016-2017 Resort Tax Funding.

Revenue Reliance on Resort Tax (Financials)

The District uses the following information to evaluate your organization’s ability to plan and efficiently use funds.

Future Growth*
Please explain any predicted 3-year growth including personnel, capital expenditures, operational expansions, and needs that require funding. Explain if you anticipate Resort Tax funds will support this growth.

Based on the 2020/21 season BSSEF brought 1,287 racers to Big Sky. This resulted in approximately 1.4 million dollars in taxable sales. To maintain this momentum BSSEF is requesting $42,000 for capital expenditure; this will include timing equipment, B-net, gates, and radios. This capital expenditure will help maintain/increase our race participation in the next few years.

Future Projects*
Other than the project(s) for this year are there any additional Resort Tax funding requests in FY23 (7/1/22-6/30/23) or FY24 (7/1/23-6/30/24)?

No

Future Projects Explanation
If yes, how much do you plan to request in FY23 and FY24? Also, please provide a brief explanation of any future projects.

COVID-19 Impact*
What has the impact of COVID-19 been on your operation and how has this impact affected your Resort Tax request?

Big Sky Ski Education Foundation has been able to continue to serve our community despite COVID-19. We have been able to operate in a decreased capacity this year. About 20 percent of our revenue comes from events we host. This year, we limited our athlete event registration to under 100 athletes each day per county guidelines. This cut the field in half for many of our events thus revenue as well.
Community Participation
The District uses the following information to evaluate if your organization has active community participation. Please provide annual counts to the best of your ability.

Engagement Strategy*
What plans do you have to expand community engagement and participation?

We create a safe, stable, growing environment for youth and teenagers. Our growth over the last ten years has shown this. In the 2012-2013 season we had 109 athletes, this year we have 290 athletes in our programs. BSSEF will continue to do outreach events such as the Gransberg Cup, Turkey Trot 5K, our annual Fireworks Stand, Golf Tournament, volunteering at the PBR, and others to keep aspiring youth in the community to be a part of our programs.
**Community Participation**
- Volunteer Hours: 2,127
- Volunteers: 31
- Program Count: 22
- Program Participants: 31
- Event Count: 4
- Event Attendance: 12
- Number of Donors: 11
- Local Donation Amount: $2,000

**Contract Compliance**
- Payment Requests-Accurate & Timely
- Response to Requests-Good
- Public Recognition of BSRAD– Unknown
- Award Orientation: Yes

**Track Record**

**Goals:** Provide the safest and quickest access to backcountry emergencies for both the victims as well as our care providers. Offer the best possible outcome for the multitude of scenarios that occur here in Big Sky.

**Accomplishments:** Have developing a cache of equipment that can handle a multitude of situations that our community and guest find themselves in. Also been offering an array of training for our members to build upon the versatility of skills our members provide.

**Outcomes:** Performing rescue operations for those in need of aid in the backcountry (82 calls). Provided members a variety of training operatives in a multitude of disciplines. Also built upon our equipment cache to respond to the many response profiles that we encounter throughout the seasons. Continuing to purchase equipment.
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td>Great community participation</td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>10</td>
<td>Great award trend trajectory, good trajectory with Resort Tax reliance</td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>25</strong></td>
<td><strong>25</strong></td>
<td></td>
</tr>
</tbody>
</table>
### Revenue (Cash only, do not include In-Kind)

<table>
<thead>
<tr>
<th>Fundraising</th>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resort Tax</td>
<td>$19,601.00</td>
<td>$4,150.00</td>
<td>-79%</td>
<td>19%</td>
</tr>
<tr>
<td>Other (IE Mill levies, County, State)</td>
<td>$13,063.00</td>
<td>$15,270.00</td>
<td>17%</td>
<td>71%</td>
</tr>
<tr>
<td>Private Donations</td>
<td>$2,415.00</td>
<td>$2,000.00</td>
<td>-17%</td>
<td>9%</td>
</tr>
<tr>
<td>Corporate Donations &amp; Sponsorships</td>
<td>$ -</td>
<td>$ -</td>
<td>#DIV/0! 0%</td>
<td></td>
</tr>
<tr>
<td>Grants</td>
<td>$ -</td>
<td>$ -</td>
<td>#DIV/0! 0%</td>
<td></td>
</tr>
<tr>
<td>Events</td>
<td>$ -</td>
<td>$ -</td>
<td>#DIV/0! 0%</td>
<td></td>
</tr>
<tr>
<td>Dues, Fees, Memberships, Sales</td>
<td>$ -</td>
<td>$ -</td>
<td>#DIV/0! 0%</td>
<td></td>
</tr>
<tr>
<td>COVID-19 Relief*</td>
<td>$ -</td>
<td>$ -</td>
<td>#DIV/0! 0%</td>
<td></td>
</tr>
<tr>
<td>Other*</td>
<td>$ -</td>
<td>$ -</td>
<td>#DIV/0! 0%</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$35,079.00</td>
<td>$21,420.00</td>
<td>-39%</td>
<td>100%</td>
</tr>
</tbody>
</table>

### Expenses

<table>
<thead>
<tr>
<th>Expense</th>
<th>Current FY</th>
<th>Year 2 FY (12/31/22)</th>
<th>Year 3 FY (12/31/23)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>$26,959.00</td>
<td>$16,570.00</td>
<td>-39%</td>
</tr>
<tr>
<td>Fundraising</td>
<td>$ -</td>
<td>$ -</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td>Programming</td>
<td>$3,250.00</td>
<td>$2,850.00</td>
<td>-12%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$30,209.00</td>
<td>$19,420.00</td>
<td>-36%</td>
</tr>
</tbody>
</table>

### 3-YEAR GROWTH FORECAST

(Include all organization projects and programs, not only those requesting resort tax funding)

<table>
<thead>
<tr>
<th>Employees</th>
<th>Current FY (12/31/21)</th>
<th>Year 2 FY (12/31/22)</th>
<th>Year 3 FY (12/31/23)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Operations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payroll &amp; Benefits</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
</tr>
<tr>
<td>Rent &amp; Mortgage</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
</tr>
<tr>
<td>Total Forecasted Expenses</td>
<td>$19,420.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assets</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reserves*</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
</tr>
</tbody>
</table>

*Purpose and intent of reserves including any restrictions*:

---

**SPONSOR EFFICIENCY**

The District will be evaluating your organizational reliance on Resort Tax revenues and your Program Expense Ratio.

Previous Fiscal Year: Recently completed Fiscal Year (12/31/20)
Current Fiscal Year: Fiscal Year as of 4/15/21

<table>
<thead>
<tr>
<th>Previous FY-Actual</th>
<th>Current FY-Budgeted</th>
<th>% Change</th>
<th>% of total Revenue Current FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>$19,601.00</td>
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<td>9%</td>
</tr>
<tr>
<td>$ -</td>
<td>$ -</td>
<td>#DIV/0! 0%</td>
<td></td>
</tr>
<tr>
<td>$ -</td>
<td>$ -</td>
<td>#DIV/0! 0%</td>
<td></td>
</tr>
<tr>
<td>$ -</td>
<td>$ -</td>
<td>#DIV/0! 0%</td>
<td></td>
</tr>
</tbody>
</table>

TOTAL $35,079.00 $21,420.00 -39% 100% *Should total 100%
Big Sky Search and Rescue

Non-Profit FY22

Big Sky Search and Rescue

Jeff Trulen Trulen  
PO box 160063  
Little Coyote, east of the community park.  
Big Sky, MT 59716

knaubco@3rivers.net  
O: 406-995-3911  
M: 406-995-3911

Greg Clark

gregormt@gmail.com
Application Form

Track Record (Goals and Outcomes)

Goals*
What were the goals of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

Provide a competent and professional level of care and service to the Big Sky community and its visitors. To accomplish this we have two main goals. The first is to evaluate our equipment to provide the safest and quickest access to backcountry emergencies for both the victims as well as our care providers. The second is to build upon our training programs to offer the best possible outcome for the multitude of scenarios that occur here in Big Sky.

Over the last three years, we have been assessing our equipment as well as our training programs to see how we can better achieve this goal. As Big Sky has grown, access to backcountry recreation has also grown along with the number of people using these resources. BSSAR has been developing a cache of equipment that can handle a multitude of situations that our community and guest find themselves in. BSSAR has also been offering an array of training for our members to build upon the versatility of skills our members provide.

Community Outcomes*
What were the community outcomes of your Resort Tax funded project(s) in the last 3 years (FY19-FY21) and were they achieved? Please explain.

The basic community outcome over the last three years is the performing rescue operations for those in need of aid in the backcountry. Our team has responded to 82 calls, for our community members and guest. We have also provided members a variety of training operatives in a multitude of disciplines, including Emergency Medical Service, including wilderness medicine, swift water rescue, avalanche hazard awareness, safety mitigation, response profiles, canine training programs, and technical rope operations.

BSSAR has also built upon our equipment cache to respond to the many response profiles that we encounter throughout the seasons. We have recently been trying to provide a faster and more comfortable means of transporting patients from the backcountry elements to optimize both safety and patient care. We have accomplished this with a couple of key pieces of equipment in the summer conditions and are now trying to achieve this goal in winter conditions.

Revenue Reliance on Resort Tax (Financials)

The District uses the following information to evaluate your organization’s ability to plan and efficiently use funds.

Future Growth*
Please explain any predicted 3-year growth including personnel, capital expenditures, operational expansions, and needs that require funding. Explain if you anticipate Resort Tax funds will support this growth.

Gallatin County Search and Rescue is at an exciting time as a county entity we are working on becoming a world-class operation. Currently, the broad range of skills that our members have is rare and unique, we
have to keep up the existing skills our members have, and also build and add to those skills so as to better serve our surrounding community.

**Future Projects***
Other than the project(s) for this year are there any additional Resort Tax funding requests in FY23 (7/1/22-6/30/23) or FY24 (7/1/23-6/30/24)?

No

**Future Projects Explanation**
If yes, how much do you plan to request in FY23 and FY24? Also, please provide a brief explanation of any future projects.

**COVID-19 Impact***
What has the impact of COVID-19 been on your operation and how has this impact affected your Resort Tax request?

In response to COVID, BSSAR has been offering trainings to smaller groups and conducting these trainings two or three times to reach as many members as possible. We hope that we will be able to get back to our more traditional styles of training with all our team as our members together as our members get vaccinated, COVID numbers decrease, and the ability to conduct more training outside as the weather warms, we are still keeping the contingency for small group trainings which may incur more expense to offer the same training two or three times.

**Community Participation**
The District uses the following information to evaluate if your organization has active community participation. Please provide annual counts to the best of your ability.

**Engagement Strategy***
What plans do you have to expand community engagement and participation?

BSSAR provides volunteer medical aid to the following events: Skijoring, AJGA junior golf tournament, The Biggie, The Rut, and Peak to Sky. In addition, we look forward to finding ways to provide education and awareness for safe travel in the backcountry no matter what the activity or time of year. We are currently involved with the development of a Big Sky community avalanche beacon park.
Community Participation

- Volunteer Hours: 670
- Volunteers: 15
- Program Count: 6
- Program Participants: 580

Contract Compliance

Payment Requests: Few late requests and a few accuracy issues
Timely Responses: Semi-responsive
Public Recognition of BSRAD: Unknown
Award Orientation Attendance: Yes

Financial Sustainability

Revenue Distribution

- COVID-19 Relief*, 3%
- Resort Tax, 28%
- Events, 19%
- Private Donations, 19%

Expense Distribution

- Administration, 19%
- Fundraising, 5%
- Programming, 76%

Award Trends

Future Project Requests

FY23: $53,050  FY24: $54,650

Forecasting Accuracy

Projected FY22: $51,500
Variance: None

Annual Operating Budget Growth

% Variance next year: -5.92%
% Variance year after: +3.00%

Track Record

Goals: The goal of WIA's Resort Tax funded projects were aimed at improving access to, and affordability of, behavioral health services.

Accomplishments: WIA worked toward achieving these goals of improving access to, and affordability of, behavioral health services by extending our sliding fee scale to include Big Sky clients from Charlie Health and two new independent practitioners, continuing existing partnerships with behavioral health practitioners, and working closely with the Big Sky Behavioral Health Coalition to improve community awareness of existing resources, reducing stigma, identifying and aiming to close gaps in safety net services.

Outcomes: WIA supported 944 hours of individual, couple, and family mental health and substance use disorder counseling.
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Category</th>
<th>Available</th>
<th>Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Participation</td>
<td>Collaboration</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Financial Sustainability</td>
<td>Collaboration</td>
<td>10</td>
<td>10</td>
<td>Good revenue distribution</td>
</tr>
<tr>
<td>Track Record</td>
<td>Efficiency</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Contract Compliance</td>
<td>Efficiency</td>
<td>5</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>25</strong></td>
<td><strong>23</strong></td>
<td></td>
</tr>
</tbody>
</table>