



Board Meeting Agenda

March 13th, 2024 | 9:00am

Big Sky Resort Area District

11 Lone Peak Drive #204

PO Box 160661

Big Sky, MT 59716

www.Resorttax.org

info@resorttax.org

406.995.3234

March’s Board meeting will be held on Wednesday, March 13th at 9:00am at the Resort Tax office (11 Lone Peak Drive, Suite #204) and through Zoom.

Join this meeting here: <https://us02web.zoom.us/j/84668516329>

I. Open Meeting

- | | | |
|--|---|-------|
| A. Roll Call | — | 9:00 |
| B. Public Comment | | |
| C. <u>Consent Agenda: Action</u> | — | 9:05 |
| a. <u>Approval of Minutes: February 14th, 2024</u> | | |
| b. <u>Finance Report: January 2024</u> | | |
| D. Regular Agenda | | |
| 1. Old Business | | |
| a. <u>Subcommittee Updates: Discussion</u> | — | 9:10 |
| b. <u>MT64/US191 Intersection Land Acquisition: Action</u> | — | 9:20 |
| 2. New Business | | |
| a. <u>May Election Update: Discussion</u> | — | 9:50 |
| b. <u>FY25 Budget Draft: Discussion</u> | — | 10:00 |
| c. <u>Opportunity Fund Application Review: Action</u> | — | 10:15 |
| • Navigator Network—Be Well Big Sky | | |
| d. <u>Morningstar Campus Update: Discussion</u> | — | 10:25 |
| E. Public Comment | | |

BSRAD BOARD & STAFF: Sarah Blechta, Chair | Ciara Wolfe, Vice Chair | Steve Johnson, Secretary & Treasurer | Kevin Germain, Director | Grace Young, Director | Daniel Bierschwale, Executive Director | Kristin Drain, Finance & Compliance Manager | Jenny Muscat, Deputy Director | Tammy Estensen, Communications & Community Engagement Manager | Jackie Haines, Director of Economic & Strategic Development | Sara Huger-Carroll, Office Manager

** All Board Meetings are recorded and live streamed. Please visit ResortTax.org for more information.*

From: [Denise Wade](#)
To: [Public Comment](#); [Big Sky Resort Tax District Information](#)
Subject: Land purchase
Date: Thursday, February 22, 2024 4:27:25 PM
Attachments: [BSRAD 2.22.24.pdf](#)

Hello All,

I appreciate how the Resort Tax board is working to outline public works projects and prioritize other needs for Big Sky. Thank you for your efforts on the Board, and I ask you to really consider the questions of how can we all best develop, and how should we best develop, Big Sky as a cohesive and liveable community for all socioeconomic backgrounds.

Please accept the attached letter for public comment.

Thank you,
Denise Wade

To: BRAD Board

From: Denise Wade, co-owner and operator of Big Sky Adventures and Tours.

RE: Roundabout at 191 intersection

Hello All,

Thank you for your work and dedication on the Big Sky Resort Tax Board and your commitment to making Big Sky a livable community for workers and residents.

I am extremely concerned about the decision to move forward with spending \$10million for land purchase to replace the stoplight with a roundabout. The problem, it appears, that you are mostly addressing with this purchase is the traffic flow and slow-moving traffic. As someone who lives in the north canyon, has a business office in the south canyon, and works frequently in the Meadow Village, I and my company vehicles travel through the 191/64 intersection multiple times a day.

There is no question that traffic flow is extremely slow at specific times of the day. The volume of construction traffic is the number one factor in traffic congestion. The vehicles coming from Bozeman going into Big Sky makes for slow traffic on Hwy 64 Monday-Friday from 7am solidly through 10am. Traffic slows down with all the large gravel, concrete, large equipment trucks climbing the steep grades going up Hwy 64 and Ousel Falls Road. If there was not a left turn arrow at the 191/64 intersection, cars coming from school would rarely be able to turn left.

Then in the evening, Monday through Thursday from 4-6pm, traffic slows down and backs up heading out of Big Sky back to Bozeman. (Friday afternoons are not bad because many construction jobs leave early on Friday.) Again, if there was not a left turn arrow at 191, any traffic coming from school would never be able to turn left. We know this because the left turn arrow has only been there for a few years. I do not see how a roundabout will help the traffic flow as the back up is not because of the light, but because of the volume of construction traffic and at specific times.

We have the opportunity to continue to and have our community evolve to be a livable, walkable/bikeable community and should be prioritized **first** over planning for large construction traffic. Evidence is clear that making roads bigger only leads to more vehicles on the road.

Then there is the issue of spending \$10M to PURCHASE the property for expansion. Wow! What else could be done with \$10M?

- BSRAD could provide funding to make the walking bike paths along 64 safer, and more user friendly, so that people are not only 18" from the roadway.
- BSRAD could provide funding for pedestrian bridges at many locations enhancing pedestrian/bike connectivity with housing, work areas, and bus stops.
- BSRAD could provide funding to BS Housing Trust to actually allow workforce housing to affordable for a worker.
- BSRAD could provide funding for park and ride areas for bus transportation.
- BSRAD could provide funding for a slow truck lane in bottleneck areas-up the mountain road, and up the Ousel Falls Road past Ousel Falls park.
- And many more possibilities

It is irresponsible to not consider other options for improvements to the Hwy 64 corridor. Why are we prioritizing construction traffic over our community? We can look toward Bozeman to see the difference in walkable areas with a large volume of traffic, and those areas that are designed for traffic first, and walkable areas second: Main Street in Bozeman verses N 19th Street.

Regarding the Water and Sewer improvements, certainly there are other areas close by to acquire land for the lift station which could be purchased for less than \$10M.

Please do not move forward with purchasing this property without considering impacts of designing our community around traffic.

Thank you for your consideration in this issue.

Denise Wade



Board Meeting Minutes

February 14th, 2024 | 9:00am

Big Sky Resort Area District
11 Lone Peak Drive #204
PO Box 160661
Big Sky, MT 59716
www.Resorttax.org
info@resorttax.org
406.995.3234

February's Board meeting was held on Wednesday, February 14th at 9:00am at the Resort Tax office (11 Lone Peak Drive, Suite #204) and through Zoom.

I. Open Meeting

A. Roll Call

Sarah Blechta called the meeting to order at 9:00 am. Sarah Blechta, Ciara Wolfe, and Grace Young were present; Kevin Germain and Steve Johnson were absent.

Public Comment

B. Consent Agenda: Action

a. Approval of Minutes: January 10th, 2024

b. Finance Report: December 2023

Motion: to approve the Consent Agenda as presented: Ciara Wolfe

Second: Grace Young

Vote: Motion Passed

C. Regular Agenda

1. Old Business

a. Subcommittee Updates: Discussion

[00:00:05](#) Daniel Bierschwale reviewed 191 corridor study and optimization plan and shared updates.

[00:00:30](#) Daniel Bierschwale reviewed strategic investments, 3% renewal, 1% renewal, and possible bonds.

b. Good Deeds Contract Amendment: Action

[00:01:48](#) **Motion:** to approve Good Deeds Contract Amendment: Ciara Wolfe

Second: Grace Young

[00:02:09](#) David O'Connor of the Big Sky Community Housing Trust answered questions from board members.

[00:02:54](#) **Vote: Motion Passed**

c. PER Eligibility Requirement: Action

[00:03:08](#) Daniel Bierschwale explained application eligibility requirements including Preliminary Engineering Report (PER) requirement. Board members discussed.

[00:12:51](#) **Motion:** to approve draft PER Eligibility Requirements: Grace Young

Second: Ciara Wolfe

[00:13:14](#) Kristin Gardner at Gallatin River Task Force asked for clarification around design plans vs Preliminary Engineering Report.

[00:14:21](#) **Vote: Motion Passed**

d. MT64/US191 Intersection Land Acquisition: Discussion

[00:14:33](#) Daniel Bierschwale explained projects requiring land acquisition at MT64/US191 intersection and possible solutions. Daniel and the board reviewed the appraisal.

[00:19:05](#) Daniel explained optimization plan and its stakeholders. In response to public questions, clarification was made that eminent domain is not available for this project.

[00:22:57](#) Public comment asked about easements and Daniel Bierschwale explained.

[00:23:48](#) Public comment asked about crash incidents and project need; *data was not immediately available*. The board explained mobility and backups are the main concern.

e. Resolution 2024-02R: Action

[00:26:32](#) Daniel Bierschwale explained next steps for land acquisition. The Resolution will be approved, and final terms will be accepted or rejected at a future meeting.

[00:29:48](#) **Motion:** to approve Resolution 2024-02R: Ciara Wolfe

Second: Grace Young

[00:29:55](#) Board members discussed financial feasibility and reserves, closing dates, and impact on budgets.

[00:36:21](#) Daniel Bierschwale discussed Water & Sewer District pump station, TIGER Grant construction, and other project options at the MT64/US191 intersection. The Board discussed the possibility of land acquisition unlocking other State, Federal, and county funds for projects.

[00:41:24](#) Grace Young asked about possible zoning and deed restrictions.

[00:49:47](#) John shared public comment in support of land acquisition.

[00:51:59](#) Greg Megaard shared support for land acquisition as intersection is a top priority.

[00:52:35](#) Lawrence Stepovich shared public comment and discussed variety of projects.

[00:53:15](#) David O'Connor shared public comment in support of land acquisition and various potential uses.

[00:56:31](#) Lizzie Peyton shared public comment in support of the land acquisition and discussed environmental pros and cons.

[00:58:00](#) Brad Niva shared public comment in support of the land acquisition and asked about public engagement.

[01:00:08](#) Shannon Steele shared public comment in support of the land acquisition.

[01:01:43](#) **Vote: Motion Passed**

[01:02:04](#) Ciara Wolfe discussed financial impacts and collaboration between multiple entities. Daniel Bierschwale explained ways community members can get involved in various efforts currently underway.

2. New Business

a. Opportunity Fund/Microgrant Procedure: Action

[01:04:26](#) Daniel Bierschwale explained changing the name of opportunity fund to microgrant and Board members discussed.

[01:07:42](#) **Motion:** to approve Microgrant Procedure as presented: Grace Young

Second: Ciara Wolfe

[01:08:08](#) Lizzie Peyton of Big Sky SNO shared appreciation for opportunity fund/microgrant and asked about a 6-month option. Board members discussed timing and intent.

[01:12:38](#) Shannon Steele of Be Well Big Sky shared comments related to program timing.

[01:14:24](#) **Vote: Motion Passed**

b. Exploration Study RFP: Action

[01:14:50](#) Daniel Bierschwale reviewed RFP, scope of work, and timing. Board members discussed.

[01:21:18](#) **Motion:** to approve Exploration Study RFP as presented: Ciara Wolfe

Second: Grace Young

[01:22:03](#) David O'Connor shared public comment.

[01:25:15](#) John shared public comment and asked questions. Sarah Blechta clarified the RFP is looking at all governance options, not solely incorporation.

[01:26:46](#) Erin Bills shared public comment.

[01:27:57](#) **Vote: Motion Passed**

~~c. Morningstar Campus Update: Discussion~~

Morningstar Campus Update rescheduled for March 13th Board meeting.

d. Be Well Big Sky Overview: Discussion

[01:28:42](#) Shannon Steele presented an overview of Be Well Big Sky, a community foundation.

[01:34:47](#) Shannon reviewed programs and services including Navigator Network, Trainings, and Collective Action.

[01:43:08](#) Shannon explained ways community members can get involved.

[01:45:25](#) Buzz Davis shared public comment.

[01:49:05](#) Suzy shared public comment.

[01:50:20](#) John shared public comment.

[01:51:27](#) David O'Connor shared public in support of community collaboration.

D. Public Comment

[01:54:32](#) **Motion to Adjourn**

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Accountant's Summary
Month Ended January 31, 2024

Balance Sheet

- No significant items to note for the bank accounts.
- Reserve funds were adjusted to reflect the 1% tax collections payments made to BSWs to date and the \$167k in TIGER project expenses.
- No other items worth noting.

Profit & Loss

- The overall tax collections appear to be significantly down when compared to January 2023 (52% decrease for the month). Most of the tax decrease is attributable to Madison County which accounted for approx. a 71% decrease in both resort tax and infrastructure tax.
- Fiscal Year-to-date (7/1/23 – 1/31/24), overall tax collections were down 11% from FY23. The graph below illustrates the trajectory of collections in FY24 and FY23 through 1/31.
- On a positive note, the district's interest earnings are nearly 67% of the operating budget.
- The total budgeted expenditures for FY24 are approx. \$1,482,625 and \$797,000 (54%) of the budget was expended as of January 31, 2024.

BIG SKY RESORT AREA DISTRICT

Balance Sheet

As of January 31, 2024

	TOTAL	
	AS OF JAN 31, 2024	AS OF DEC 31, 2023 (PP)
ASSETS		
Current Assets		
Bank Accounts		
10000 Funds Available		
10100 Reserved Funds	-10,257,345.95	-11,552,224.84
10120 FSB-Checking #80073430	250,000.00	231,525.13
10121 FSB - Repurchase Checking	15,968,414.14	16,870,256.03
10125 FSB - Disbursements #1336	138.63	138.63
10140 FSB-MM #80073422 - .19	5,132.84	5,130.67
10160 Petty Cash	200.00	200.00
10170 STIP	11,723.81	11,670.20
10180 DA Davidson - #65611532 Operating	3,557,633.09	3,556,344.88
10190 DA Davidson - #17191343 Investment	3,566,475.90	3,555,621.52
Total 10000 Funds Available	13,102,372.46	12,678,662.22
10500 Funds Reserved		
10503 TIGER Project - Resolution 2022.01R	239,995.94	406,662.94
10505 Infrastructure Tax Collected, net	4,563,253.66	5,691,465.55
10510 Emergency reserve	1,500,000.35	1,500,000.35
10520 Operating reserve	329,017.00	329,017.00
10530 Capital reserve	3,550,000.00	3,550,000.00
10551 Opportunity fund	75,079.00	75,079.00
Total 10500 Funds Reserved	10,257,345.95	11,552,224.84
1072 Bill.com Money Out Clearing	12.00	12.00
Total Bank Accounts	\$23,359,730.41	\$24,230,899.06
Accounts Receivable		
12000 Accounts Receivable	2,255,065.62	2,398,165.40
Total Accounts Receivable	\$2,255,065.62	\$2,398,165.40
Other Current Assets		
13100 Prepaid expenses		
13100.2 Prepaid software	24,784.35	28,088.46
Total 13100 Prepaid expenses	24,784.35	28,088.46
Total Other Current Assets	\$24,784.35	\$28,088.46
Total Current Assets	\$25,639,580.38	\$26,657,152.92

BIG SKY RESORT AREA DISTRICT

Balance Sheet

As of January 31, 2024

	TOTAL	
	AS OF JAN 31, 2024	AS OF DEC 31, 2023 (PP)
Fixed Assets		
15030 Capital Furnishings & Fixtures	5,228.49	5,228.49
15040 Buildings & Improvements	558,781.05	558,781.05
16000 Accumulated Depreciation	-87,303.25	-87,303.25
Total Fixed Assets	\$476,706.29	\$476,706.29
Other Assets		
19010 Deferred outflows		
19011 Deferred Outflows - BSWs Agreement	15,847,571.00	17,345,238.50
Total 19010 Deferred outflows	15,847,571.00	17,345,238.50
Total Other Assets	\$15,847,571.00	\$17,345,238.50
TOTAL ASSETS	\$41,963,857.67	\$44,479,097.71
LIABILITIES AND EQUITY		
Liabilities		
Current Liabilities		
Accounts Payable		
21000 General Accounts Payable	20,531.22	20,157.64
Total Accounts Payable	\$20,531.22	\$20,157.64
Credit Cards		
21100 Divvy Credit Card	8,410.81	8,038.41
Total Credit Cards	\$8,410.81	\$8,038.41
Other Current Liabilities		
23000 Payroll Liabilities	0.00	0.00
23020 Accrued Leave	10,939.71	10,939.71
23100 State Unemployment	77.54	11.32
23110 State Withholding	-519.07	-519.07
23401 Health Insurance (company paid)	-1,199.34	-1,014.81

BIG SKY RESORT AREA DISTRICT

Balance Sheet

As of January 31, 2024

	TOTAL	
	AS OF JAN 31, 2024	AS OF DEC 31, 2023 (PP)
Total 23000 Payroll Liabilities	9,298.84	9,417.15
23500 General Appropriations		
Arts Council	235,000.00	235,000.00
Big Sky Chamber of Commerce	135,558.77	135,558.77
Big Sky Community Housing Trust	888,214.44	982,090.78
Big Sky Community Organization	272,441.24	272,441.24
Big Sky Discovery Academy	961.68	1,712.00
Big Sky Fire Department	724,311.00	724,311.00
Big Sky Sustainability Network Organization	377,150.50	377,150.50
Big Sky Trails, Recreation & Parks District	518,680.21	611,952.25
Big Sky Transportation District	1,175,000.00	1,175,000.00
Big Sky Water & Sewer District	560,000.00	560,000.00
Center for Large Landscape Con.	30,847.45	45,083.61
Food Bank	47,827.68	47,827.68
Friends of the Comm. Library	162,995.05	162,995.05
Gallatin Canyon Water & Sewer District	471,526.41	471,526.41
Gallatin River Task Force	809,540.87	886,174.01
Grow Wild	91,715.91	106,330.46
Morningstar	408,500.00	442,500.00
Sheriff's Office	331,834.00	609,678.00
Snowmobile Association	30,000.00	30,000.00
Visit Big Sky	695,721.75	695,721.75
Warren Miller Performing Arts C	176,800.00	176,800.00
Total 23500 General Appropriations	8,144,626.96	8,749,853.51
Total Other Current Liabilities	\$8,153,925.80	\$8,759,270.66
Total Current Liabilities	\$8,182,867.83	\$8,787,466.71
Long-Term Liabilities		
23600 WRRF Phase I Project	15,847,571.00	17,345,238.50
Total Long-Term Liabilities	\$15,847,571.00	\$17,345,238.50
Total Liabilities	\$24,030,438.83	\$26,132,705.21
Equity		
30100 Retained Earnings	4,946,307.65	4,946,307.65
30200 Committed Fund Balance	3,581,801.29	3,581,801.29
30300 Fund Balance	9,706,845.48	9,706,845.48
30500 Investment in Fixed Assets	464,581.04	464,581.04
31000 Restricted Fund Balance	5,297,424.26	5,297,424.26
32000 Nonspendable Fund Balance	12,584.81	12,584.81
Net Income	-6,076,125.69	-5,663,152.03
Total Equity	\$17,933,418.84	\$18,346,392.50
TOTAL LIABILITIES AND EQUITY	\$41,963,857.67	\$44,479,097.71

BIG SKY RESORT AREA DISTRICT

Budget vs. Actuals: FY_2023_2024 - FY24 P&L

January 2024

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
Income				
40010 Interest Earned	72,593.20	5,000.00	67,593.20	1,451.86 %
40020 Late Payment Interest	21.36	500.00	-478.64	4.27 %
40030 Late Fees from Tax Collections	830.67	1,500.00	-669.33	55.38 %
41000 Tax Collections	1,285,732.53	2,909,262.12	-1,623,529.59	44.19 %
Total Income	\$1,359,177.76	\$2,916,262.12	\$ -1,557,084.36	46.61 %
GROSS PROFIT	\$1,359,177.76	\$2,916,262.12	\$ -1,557,084.36	46.61 %
Expenses				
60000 Bad Debt		41.67	-41.67	
60010 Bank Charges	9,725.53	5.00	9,720.53	194,510.60 %
60080 Dues & Meeting Expenses	36.69	4,244.59	-4,207.90	0.86 %
60090 Public Information & Engagement	8,897.53	11,533.31	-2,635.78	77.15 %
61000 Dues & Property Taxes	2,116.02	2,500.00	-383.98	84.64 %
62000 Insurance	2,220.65	72.65	2,148.00	3,056.64 %
63000 Office Expenses	13,501.52	7,066.58	6,434.94	191.06 %
64000 Professional Fees	28,415.00	33,755.65	-5,340.65	84.18 %
65000 Travel	244.91	162.23	82.68	150.96 %
66000 Utilities	763.11	878.75	-115.64	86.84 %
67000 Personnel Expenses	52,250.23	61,067.67	-8,817.44	85.56 %
Total Expenses	\$118,171.19	\$121,328.10	\$ -3,156.91	97.40 %
NET OPERATING INCOME	\$1,241,006.57	\$2,794,934.02	\$ -1,553,927.45	44.40 %
Other Income				
70000 Other Income	10,354.27		10,354.27	
Total Other Income	\$10,354.27	\$0.00	\$10,354.27	0.00%
Other Expenses				
79000 Other expenses	1,664,334.50		1,664,334.50	
Total Other Expenses	\$1,664,334.50	\$0.00	\$1,664,334.50	0.00%
NET OTHER INCOME	\$ -1,653,980.23	\$0.00	\$ -1,653,980.23	0.00%
NET INCOME	\$ -412,973.66	\$2,794,934.02	\$ -3,207,907.68	-14.78 %

BIG SKY RESORT AREA DISTRICT

Profit and Loss - Comparative by Month

January 2024

	TOTAL			
	JAN 2024	JAN 2023 (PY)	CHANGE	% CHANGE
Income				
40010 Interest Earned	72,593.20	13,302.76	59,290.44	445.70 %
40020 Late Payment Interest	21.36	518.71	-497.35	-95.88 %
40030 Late Fees from Tax Collections	830.67	740.89	89.78	12.12 %
41000 Tax Collections	1,285,732.53	2,686,765.35	-1,401,032.82	-52.15 %
Total Income	\$1,359,177.76	\$2,701,327.71	\$ -1,342,149.95	-49.68 %
GROSS PROFIT	\$1,359,177.76	\$2,701,327.71	\$ -1,342,149.95	-49.68 %
Expenses				
60010 Bank Charges	9,725.53	0.20	9,725.33	4,862,665.00 %
60080 Dues & Meeting Expenses	36.69	947.22	-910.53	-96.13 %
60090 Public Information & Engagement	8,897.53	4,201.18	4,696.35	111.79 %
61000 Dues & Property Taxes	2,116.02	2,116.02	0.00	0.00 %
62000 Insurance	2,220.65	3,846.50	-1,625.85	-42.27 %
63000 Office Expenses	13,501.52	5,688.21	7,813.31	137.36 %
64000 Professional Fees	28,415.00	44,688.37	-16,273.37	-36.42 %
65000 Travel	244.91		244.91	
66000 Utilities	763.11	1,809.40	-1,046.29	-57.83 %
67000 Personnel Expenses	52,250.23	46,997.30	5,252.93	11.18 %
Total Expenses	\$118,171.19	\$110,294.40	\$7,876.79	7.14 %
NET OPERATING INCOME	\$1,241,006.57	\$2,591,033.31	\$ -1,350,026.74	-52.10 %
Other Income				
70000 Other Income	10,354.27		10,354.27	
Total Other Income	\$10,354.27	\$0.00	\$10,354.27	0.00%
Other Expenses				
79000 Other expenses	1,664,334.50	1,426,359.50	237,975.00	16.68 %
Total Other Expenses	\$1,664,334.50	\$1,426,359.50	\$237,975.00	16.68 %
NET OTHER INCOME	\$ -1,653,980.23	\$ -1,426,359.50	\$ -227,620.73	-15.96 %
NET INCOME	\$ -412,973.66	\$1,164,673.81	\$ -1,577,647.47	-135.46 %

BIG SKY RESORT AREA DISTRICT

Budget vs. Actuals: FY_2023_2024 - FY24 P&L

July 2023 - January 2024

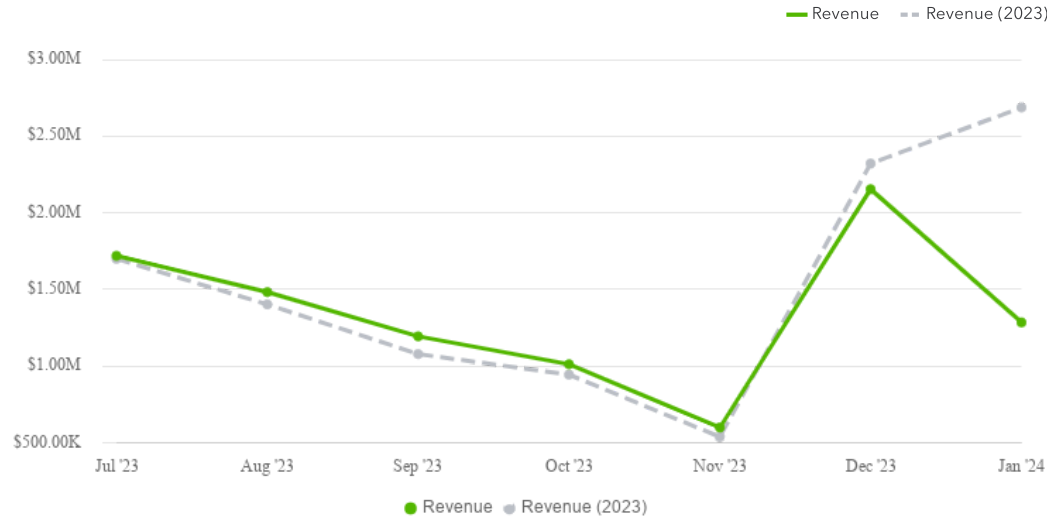
	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
Income				
40010 Interest Earned	532,809.20	35,000.00	497,809.20	1,522.31 %
40020 Late Payment Interest	2,422.13	3,500.00	-1,077.87	69.20 %
40030 Late Fees from Tax Collections	10,734.97	10,500.00	234.97	102.24 %
41000 Tax Collections	9,451,013.38	11,593,957.48	-2,142,944.10	81.52 %
Total Income	\$9,996,979.68	\$11,642,957.48	\$ -1,645,977.80	85.86 %
GROSS PROFIT	\$9,996,979.68	\$11,642,957.48	\$ -1,645,977.80	85.86 %
Expenses				
60000 Bad Debt		291.69	-291.69	
60010 Bank Charges	29,043.19	35.00	29,008.19	82,980.54 %
60020 Appropriations	11,957,837.00		11,957,837.00	
60021 Opportunity Fund Appropriations	72,336.32		72,336.32	
60080 Dues & Meeting Expenses	11,559.78	29,712.09	-18,152.31	38.91 %
60090 Public Information & Engagement	77,703.77	101,333.37	-23,629.60	76.68 %
61000 Dues & Property Taxes	12,505.60	13,400.00	-894.40	93.33 %
62000 Insurance	6,028.22	2,358.55	3,669.67	255.59 %
63000 Office Expenses	57,219.40	49,452.50	7,766.90	115.71 %
64000 Professional Fees	219,605.56	246,799.67	-27,194.11	88.98 %
65000 Travel	2,128.22	1,445.08	683.14	147.27 %
66000 Utilities	5,405.11	5,481.25	-76.14	98.61 %
67000 Personnel Expenses	375,587.98	427,473.80	-51,885.82	87.86 %
Total Expenses	\$12,826,960.15	\$877,783.00	\$11,949,177.15	1,461.29 %
NET OPERATING INCOME	\$ -2,829,980.47	\$10,765,174.48	\$ -13,595,154.95	-26.29 %
Other Income				
70000 Other Income	82,523.78		82,523.78	
Total Other Income	\$82,523.78	\$0.00	\$82,523.78	0.00%
Other Expenses				
79000 Other expenses	3,328,669.00		3,328,669.00	
Total Other Expenses	\$3,328,669.00	\$0.00	\$3,328,669.00	0.00%
NET OTHER INCOME	\$ -3,246,145.22	\$0.00	\$ -3,246,145.22	0.00%
NET INCOME	\$ -6,076,125.69	\$10,765,174.48	\$ -16,841,300.17	-56.44 %

BIG SKY RESORT AREA DISTRICT

TAX COLLECTIONS YTD
07/01/2023 to 01/31/2024

\$9,451,013.38

Total revenue



Filtered by

5 income: 41100 Tax Collections:3% Tax:Gallatin County, 41200 Tax Collections:3% Tax:Madison County, 41400 Tax Collections:3% Tax:Other, 41110 Tax Collections:1% for Infrastructure:Gallatin Infrastructure Tax, 41210 Tax Collections:1% for Infrastructure:Madison Infrastructure Tax

Time period	Revenue	Revenue (2023)
Jul '23	\$1,720,094.81	\$1,699,710.79
Aug '23	\$1,483,098.65	\$1,403,101.02
Sep '23	\$1,194,686.39	\$1,079,271.31
Oct '23	\$1,012,784.65	\$945,020.24
Nov '23	\$600,267.79	\$539,493.44
Dec '23	\$2,154,348.56	\$2,321,443.35
Jan '24	\$1,285,732.53	\$2,686,765.35



FY24 BSRAD Subcommittee Representation

All subcommittees supported by Staff

Elevate Big Sky: Grace Young

Wellness District: Sarah Blechta

School District: TBD

Library District: TBD

Incorporation Exploration: Sarah Blechta

Application: Ciara Wolfe & Steve Johnson

Reserve Strategies: Grace Young & Steve Johnson

Joint County: Kevin Germain

Transit & Transportation: Kevin Germain & Grace Young

Strategic Investments: Kevin Germain & Steve Johnson

- **Capital Imp Plan**
- **3% Renewal**
- **1% Renewal**
- **Current 1% Projects**

REVENUES

	FY24 Budget	FY24 Forecast	FY25 Budget	FY26 Budget	FY27 Budget
3% Collections	16,977,292	16,128,427	16,977,292	18,102,292	18,102,292
1% Collections	6,042,316	5,740,200	6,042,316	6,417,316	6,417,316
Investment Income	600,000	600,000	700,000	700,000	700,000
TOTAL	\$ 23,619,608	\$ 22,468,628	\$ 23,719,608	\$ 25,219,608	\$ 25,219,608

EXPENSES

Bad Debt (60000)	500	500	500	500	500
Bank & Investment Fees(60010)	60	40,000	40,000	40,000	40,000
Meeting Expenses (60080)	5,435	12,000	15,000	15,000	15,450
Public Information (60090)	163,173	145,000	166,400	184,916	190,463
Dues & Property Taxes (61000)	61,800	51,800	62,875	62,875	64,761
Insurance (62000)	7,532	8,000	8,100	8,899	9,166
Office Expenses (63000)	86,591	86,591	98,264	110,107	113,410
Professional Fees (64000)	407,338	387,338	397,500	275,919	284,197
Travel (65000)	5,179	3,000	5,500	6,120	6,304
Utilities (66000)	9,205	9,205	10,000	10,876	11,202
Personnel Expenses (67000)	738,910	738,910	750,000	866,459	892,453
Debt Service (68000)			-	-	-
Capital Expenditures (69000)			-	-	-
BSRAD OPERATING EXPENSES	1,485,723	1,482,344	1,554,139	1,581,671	1,627,906
<i>BSRAD Admin %</i>	<i>6.3%</i>		<i>6.6%</i>	<i>6.3%</i>	<i>6.5%</i>
Forecasted 3% Requests (Non-Government)	-		11,094,535	9,546,446	
Committed Interlocal Funding (Government)	-		3,161,277	4,000,000	
1% for Infrastructure (Canyon Pipe & Prepayment Not Included)	-		3,145,122	3,302,379	3,467,497
Forecasted Incorporation Exploration RFP	-		500,000		
Coordinating Council of Big Sky Funding	-		20,000		
Wellness District Legal Fees	-		75,000		
Reserve Allocation	-		1,461,768	1,011,927	12,310
TOTAL	\$ 1,485,723		\$ 21,011,841	\$ 19,442,423	\$ 5,107,713

	FY24 Budget	FY24 Forecast	FY25 Budget	FY26 Budget	FY27 Budget
Operating Reserve Goal	329,017		340,785	352,712	365,022
Emergency Reserve Goal	1,500,000		2,500,000	2,500,000	2,500,000
Capital Reserve Goal	3,550,000		4,000,000	5,000,000	5,000,000
Reserve Commitment			1,461,768	1,011,927	12,310
Reserve Goal	5,379,017		6,840,785	7,852,712	7,865,022

Navigator Network - volunteers serve as vital links within the community & reduce stigma

FY24 Opportunity Fund

Be Well Big Sky

Shannon Steele
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Shannon Steele

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Application

Project Name*

Navigator Network - volunteers serve as vital links within the community & reduce stigma

Description*

Be Well Big Sky embraces a data-driven model of community-level care through 'normal' everyday community members: bartenders, ski patrol, teachers, business owners, retirees, and more. The Navigator Network employs volunteers trained in suicide prevention and emotional first aid, serving as vital links within the community. They play a critical role in the referral pathway to care, as they are a bridge between individuals and service providers. It is a leap for many community members to feel the need for support and cold call for help. It is much easier to talk to a trusted community member who can make a warm hand off. Navigators also equip individuals and organizations with Holistic Emotional First Aid tools, nurturing resilience and fostering collective well-being. What this looks like in practice is teaching breathing techniques, movements, and other tools to regulate the nervous system and integrate tangible changes in daily life to avoid burnout. Be Well Big Sky serves as a catalyst for community collaboration, driving tangible change by addressing pressing social issues identified by the Navigator Network and community at large. Navigators have a seat at the table when it comes to bringing new initiatives into the community, providing feedback to ensure successful integration and ongoing evaluation. Through these concerted efforts, we aim to foster a culture of support and empowerment, ensuring that every member of our community feels seen, heard, and valued.

Investment Type*

Programming

Impact Area*

Health & Safety

Location*

Big Sky, Montana

Be Well Big Sky is a grassroots, community-led initiative, comprising a diverse array of volunteers within the Big Sky community. From bartenders to ski patrollers, teachers to small business owners, our initiative represents a broad spectrum of demographics, deeply woven into the fabric of our community.

Community Benefit*

Please explain the community benefit of the project. Include details such as the measurable and identified need this project will address, populations served, metrics for success, etc.

The 2020 Big Sky Behavioral Health Initiative Report underscored the barriers to care including limited services, financial constraints, language barriers, and stigma surrounding mental health. If our program is successful, every industry in our community will have someone who is engaged in the Navigator Network and can facilitate warm hand-offs to care. Community members will know who to go to when they need help, feel comfortable asking for help, and successfully get connected to services they need.

We will collect a range of metrics, including:

- Narratives of lived experiences and their impact
- # of navigators engaged and community members reached
- # and quality of outreach events

Goals:

- Coordinate 12 mental health columns in the local newspaper

- Equip 35 navigators with tools to serve 3,500 community members
- Host 15 outreach events to enhance resource awareness

Amount Requested*

\$25,000.00

Total Cost*

What is the total cost of this project? Include all project expenses from inception to completion of the project in this amount.

\$38,994.00

Date of Funding*

When do you plan to have incurred the costs being requested?

06/20/2024

Additional Information

Please provide any additional information on this request if needed.

Extensive research, including findings from Global Mental Health, the CDC, and Substance Abuse and Mental Health Services Administration (SAMHSA), consistently validates the effectiveness of community-initiated care across various social issues, especially healthcare access, addiction, and mental health support. The Gallatin Behavioral Health and Park County Coalitions have identified community-initiated care and the critical role community members play in facilitating warm handoffs to the referral network as a significant gap. Both have expressed interest in expanding the navigator network model to surrounding communities in the future.

The complex issues surrounding mental and behavioral health require action and involvement on a community-wide level. This is why the Navigator Network is so critical in moving the conversation forward, and becoming a vehicle for unified, community-driven action.

Navigator Network Program Budget	
Contractor- coordination, convening, facilitation, planning & support	12,750
Content and curriculum consultant	6,000
Monthly meetings + events	1,200
Navigator Trainings - 12/year	3,600
Navigator materials + supplies	2,250
Outreach & stigma reduction - storytelling	6,500
Printing & copying - outreach materials	3,325
Meals & Refreshments	650
Travel	750
Software	1,369
Meeting space	600
Total	38,994

Be Well Big Sky Budget - Jan 1- Dec 31, 2024

			Actual	Budget
Revenue				
Earned Revenue				14,000
Contributions				
	Individual		129	60,000
	Corporate			10,000
	Foundation		30,000	262,000
Revenue Total			30,129	346,000
Expenses				
General				
	Software			3,234
	Printing & Copying			3,325
	Office Supplies			750
		Meals & Refreshments		980
Travel				
	Transportation			1500
		Meals & Refreshments		500
		Lodging		3000
Professional Expenses				
	Contracted Services		6,858	123,200
	Graphic Design / Marketing			6,000
	Prof. Development - Fees & Materials			9,000
	Memberships / Subscriptions			1,000
Program				
	Event Space			300
		Meals & Refreshments		2400
		Misc. Event Expenses		500
Admin Fee				
				14,112
Expense Total			6,858	169,801