

#8

**COMPLETE**

**Collector:** Copy of Web Link 1 (Web Link)  
**Started:** Wednesday, November 15, 2023 7:36:29 AM  
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## Page 1: Qualifications, Experience, &amp; Capacity

**Q1** Yes

Is organization staff familiar with the HOME-ARP Request for Qualifications Guidebook?

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**Q2**

Contact Person Information:

Full Name	Sue Taylor
Position Title	Development Director
Email	staylor@nadc-nabn.org
Phone Number(s)	

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**Q3**

Organization Information:

Organization Name	Native American Development Corporation
Street Address	17 N 26th Ave
City	Billings, MT
State	MT
ZIP + 4	59101
Email Address	staylor@nadc-nabn.org
Phone & FAX Numbers	4062593804

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**Q4**

Organization website: Please enter complete URL.

<http://www.nadc-nabn.org>

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## Page 2: Organization Type

**Q5**

**Nonprofit - 501(c)3 Charitable Nonprofit Corporation**

Organization Type: Please select one of the following.

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Page 3: Nonprofit Documentation

**Q6**

IRS Determination Letter Acceptable formats PDF, JPG, JPEG

**501c3.pdf (52.5KB)**

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**Q7**

Current Bylaws Acceptable formats PDF, JPG, JPEG

**BY%20LAWS.PDF (1MB)**

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**Q8**

Articles of Incorporation Acceptable formats PDF, JPG, JPEG

**NADC%20Articles%20of%20incorporation.pdf (274.4KB)**

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**Q9**

Governing body list: A list of the current Board of Directors or other governing body of the organization. The list must include the name, telephone number, address, occupation or affiliation of each member, and must identify the principal officers of the governing body. (Acceptable formats PDF, DOC, DOCX, JPG, JPEG)

**CURRENT-NADC\_Board%20of%20Directors\_.pdf (83KB)**

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Page 4: Organizational Details / Financial Information

**Q10**

Organizational chart: The chart must illustrate the organization's administrative framework and staff positions. Acceptable formats PDF, DOC, DOCX, JPG, JPEG

**NADC%20Org%20Structure%204.28.23\_BC.pdf (169.3KB)**

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**Q11**

Most recent organizational audit or IRS Form 990. Acceptable formats PDF, JPG, JPEG

**2022%20NADC%20Audt%20Report.pdf (2.1MB)**

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**Q12**

Treasurer / Financial Report through December 31. Acceptable formats PDF, JPG, JPEG

**NADC%20Interim%20Financials%2012.31.22.pdf (820.9KB)**

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**Q13**

Unique Entity Identification (UEI) Number: A UEI is a number issued by the federal government's System for Award Management (SAM) to identify businesses and other entities that do business with the federal government. The UEI replaces the DUNS number. If your entity is already registered in SAM.gov, it has already been assigned a UEI number. Simply log into SAM.gov to access it. Entities intending to bid on contracts or grants directly from the federal government should visit SAM.gov and choose "Register Entity" to receive a UEI. Those who would like a UEI for sub-award reporting should choose "Get Unique Entity ID." There is no cost to register for a UEI and it can usually be created within one business day. FREE local assistance is available at the Montana Procurement Technical Assistance Program, 201 N Broadway, Billings, MT 59101 / 406.869.8410 / langman@bigskyeda.org. Enter your UEI number below.

SUVFQUSVKTE3

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**Q14**

System for Award Management (SAM) Registration: SAM is an official website of the U.S. federal government. All entities that receive payment with federal funds from Community Development Division programs must be registered in SAM. There is no cost to register; Register Online. FREE local assistance is available at the Montana Procurement Technical Assistance Program, 201 N Broadway, Billings, MT 59101 / 406.869.8410 / langman@bigskyeda.org.

Please click or enter the organization's SAM registration date:

**02/01/2024**

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**Q15**

Commercial and Government Entity (CAGE) Code. A CAGE code is a unique identifier assigned to government agency suppliers, to government agencies themselves, and to organizations funded by federal grants.

CAGE Code:

**4xxJ0**

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**Q16**

Authorized Responsible Party Signature: This is the person with organizational legal authority to bind the organization in grant administration matters.

Full Name:

**Leonard J Smith, Jr.**

Position / Job Title:

**CEO**

Phone Number

**4062593804**

Email Address:

**lsmith@nadc-nabn.org**

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**Q17**

Describe the length of time the organization has been in operation and the organization's purpose. (500 characters maximum)

The Native American Development Corporation (NADC) is a nonprofit corporation operating continuously since 1996. NADC was founded on the basic premise of "combating community deterioration, poverty, unemployment, racial discrimination and prejudice" by providing programs and resources that seek to alleviate the underlying issues related to generational poverty.

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**Q18**

Describe the types of supportive services currently being provided by the organization. (2,000 characters maximum)

NADC has historically and consistently remained an organization that works to create, stimulate, and advocate for Native American people and societies. Late in 2018, the organization opened the Billings Urban Indian Health and Wellness Center (BUIHWC) to serve the American Indian and non-Indian population living in Billings and Yellowstone County through a range of culturally appropriate medical and behavioral health services. The organization serves entrepreneurs, individuals, families, and regions working towards self-sufficiency, economic and social stability through core activity areas of: Health and Wellness; Technical Assistance; Business Lending; and Entrepreneurial Advocacy and Support. Our work is driven by a desire to provide a "hand up" and not a "hand out". NADC services are designed to be culturally appropriate for Native Americans, but services are not limited to those who are of Native heritage. BUIHWC serves insured and uninsured individuals through full ambulatory care services. Current supportive services include medical care, substance use disorder, suicide prevention, diabetes care, health promotion and disease prevention, and positive parenting. In addition to Health Division supportive services, the organization offers credit counseling, financial literacy, and workforce development programs through the Economic Development Division and NADC is the state-wide certification body for Recovery Residences. The organization also houses the Native American Empowerment Project (NAEP) which is a community-based service coordination program that offers support services to individuals experiencing the effects of domestic violence, mental health issues, or substance use disorder. The core components of the program include: • Outreach and Case Management with a Social Services Approach • Cultural Approach to Healing • Participant-Driven Empowerment Plans • Professional Development Support Services • Network Building to Support Self-Empowerment

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**Q19**

How many people has the organization served over the past 12 months? (whole numbers only; no ranges, no percentages)

4800

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**Q20**

What percentage of those served meet criteria for at least one of the qualifying populations as defined in the HOME-ARP Notice: CPD-21-10? (decimal format to show the percentage [e.g., .25 for 25%; .5 for 50%; etc.])

0.42

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**Q21**

Describe the organization's experience and compliance with federally funded programs. (1,000 characters maximum)

The Native American Development Corporation is a current recipient of federal funds from Indian Health Services, Substance Abuse and Mental Health Services (SAMHSA), Office of Minority Health, US Treasury, Minority Business Development Agency, Department of Defense, and the Economic Development Administration. Previous funding includes Small Business Administration, and Department of Agriculture. NADC staff are well versed in funding compliance, and we have internal controls in place to ensure proper financial tracking. We are subject to a Single Audit due to the volume of federal funds managed each year. The organization has robust systems in place for compliance, financial reporting, and federal fund management. NADC upgraded from QuickBooks to NetSuite accounting software, which has an add-on module (Solution 7) for budget tracking and forecasting. We also conduct monthly project manager meetings to further track performance measures, HR, finance, and administrative topics.

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**Q22**

Describe the agency's policy for maintaining confidentiality of individuals and families served. (1,000 characters maximum)

Confidentiality applies to human subjects, data information, and patient information. NADC adheres to all federal and state regulatory monitoring requirements to protect participant identities, secure personally identifiable information, and ensure the privacy and security of protected health information. All data and patient record information is stored per federal data handling and management guidelines. Staff are required by law and professional ethics to protect the confidentiality of all communication except for concerns of harm to self or others. Exceptions and limits include the following situations: 1. Duty to warn of violent behaviors. 2. Suicide, homicide, and/or self-injury. 3. Imminent risk of severe bodily harm or death. 4. Mandatory reporting of child or elder abuse. Aside from these exceptions, staff may not discuss the details of a participant's situation with others or even indicate whether a participant is receiving healthcare services.

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**Q23**

Describe the organization's policies, procedures, and experience in each of the following three areas: (1,500 character maximum for each)

## Financial Management &amp; Accountability

**Summary of Significant Accounting Policies**

1. NADC prepares its financial statements in conformance with standards described in the GAAP.
2. Be the reporting entity for all revenues and expenditures for which it exercises oversight responsibility.
3. Use fund and account groups to report its financial position and the results of its operations.
4. Use the modified accrual basis of accounting all governmental funds.
5. Record investments in accordance with GAAP.
6. Record prepaids items if payment made to vendors for services that will benefit periods beyond the current year.
7. Restrict certain resources as instructed by grants or for the repayment of bonds or notes, to the extent that debt instruments or policy requires.
8. Report all fixed assets, acquired or constructed for general purposes, as expenditures in the fund that finances the acquisition and are capitalized at cost or estimated historical cost.
9. Compute depreciation using the straight-line method with estimated useful lives as follows: Buildings (15-40 years), Building Improvements (7-20 years) and Equipment/Furniture (3-7 years)
10. Record the current portion of accrued compensated absences within the fund in which they arose and the long-term portion shall be recorded in the general long-term liabilities section.
11. Recognize long term debt as a liability when it is expected to be financed from expendable available financial sources and it is over one year period.

## Personnel Management

NADC employs a full-time human resource professional and has an Employee Handbook that each person must read, understand, and formally accept. Bambee HR software platform is used for time tracking. New position openings are posted on indeed.com and distributed internally. There are formal processes in place for reporting any misconduct or unsafe conditions. NADC is a diverse workplace and is an equal opportunity employer.

## Procurement &amp; Purchasing

**Policies and Objectives**

- i. It is the policy of the organization to procure only those items that are required to perform the mission and/or fill a bona fide need. Procurements will be made with complete impartiality based strictly on the merits of supplier proposals and applicable related considerations such as delivery, quantity, etc.
- ii. It is the policy of the organization to follow competitive practices only for annual purchases over \$5,000.
- iii. It is the policy of the organization to keep on file a Contracted Services Agreement with any contractor to be paid more than \$1,000 on a per contract basis.

## Recordkeeping &amp; Reporting

1. To provide an accurate and auditable record of all financial transactions, the organization's books, records, and accounts must be maintained in conformity with generally accepted accounting principles. Employees are responsible for safeguarding organization assets under their control and for maintaining an auditable record of financial transactions.
2. Further, the organization specifically requires that:
  - a. No funds or accounts may be established or maintained for purposes that are not fully and accurately described on the books and records of the organization.
  - b. Receipts and disbursements must be fully and accurately described on the books and records of the organization.
  - c. No false entries may be made on the books or records; nor any false or misleading reports issued.
  - d. Payments may be made only to the granting party or a valid assignee and only for the actual services rendered or products delivered. No false or fictitious invoices may be paid.
  - e. If an employee has reason to believe that the organization's books and records are not in accord with the foregoing requirements, report the matter to the Executive Director.

All data collection, fiscal management, and participant protections are in accordance with federal regulation.

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**Q24**

If the organization currently manages grant funding, describe the method for tracking staff time on grant-specific tasks. (500 characters maximum)

The organization utilizes an online platform for time tracking by person. We do not have individual timesheets for grant-specific tasks. Our accounting software, NetSuite, has a payroll allocation feature that we utilize per pay period. The majority of our federal funds employ full-time positions, but for those staff positions who are paid from more than one source the Payroll Allocation feature is utilized. The payroll allocation is reviewed every pay period and updated as often as needed.

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**Q25**

Describe the standards the organization uses for code-of-conduct covering conflicts of interest and governing the actions of its officers, Board of Directors, and employees. (2,000 characters maximum)

Native American Development Corporation adheres to a code of conduct that fosters professional commitment and sustainability of the organization in the areas of Conduct; Responsibility; Representation; Standards of Care; Accountability for Outcomes; Skills Development; Interagency and Public Relations; Issue Resolution and; Community and Political Standards. Each of these areas includes a core principle, intent, and guiding principles to further guide the direction and growth of the organization in a way that respects and values each person. The guiding Principles for Professional conduct include the following: 1. Act with integrity, competence, diligence, respect, and in an ethical manner with the public, customers, prospective clients, employers, employees, colleagues, and other participants. 2. Place the integrity of the Native American Development Corporation and the interests of the organization above their own personal interests. 3. Use reasonable care and exercise independent professional judgment when conducting business, making recommendations, taking actions, and engaging in other professional activities. 4. Practice and encourage others to practice professionally and ethically that will reflect credit on themselves, the profession, and the organization. 5. Promote the integrity and viability of Native American Development Corporation for the ultimate benefit of the greater communities served. 6. Maintain and improve professional competence and strive to maintain and improve the competence of other professionals.

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**Q26****Yes**

Does the organization carry fidelity bond coverage for responsible officials?

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**Q27**

**CERTIFICATIONS:** Please certify compliance with each of the following by checking the box next to each:

**Funded activities must exclusively benefit individuals and families in qualifying populations in the City of Billings.**

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**Subrecipients must prevent the duplication of funds to prevent fraud, waste, and abuse by verifying a qualifying household is not already receiving the same eligible supportive service or has been approved to receive the same service through another program or service provider. Subrecipients must immediately repay the City of Billings for assistance that is determined to be duplicative.**

,

**Subrecipients must maintain procedures to prohibit employees, board members, and officers from using their positions for a purpose that has the appearance of being motivated by a desire for private gain for themselves or others.**

,

**Financial records, supporting documentation, statistical records, and all other records pertinent to funding shall be retained for a period of five years following completion of project/activity.**

,

**Subrecipients shall comply with the Fair Housing Act, HUD regulations, and the Montana Human Rights Act prohibiting employment, contracting, and beneficiary discrimination based on: Disability - includes people with HIV / AIDS and people in recovery from alcohol / drugs; Race / Color; Religion; Religious Belief; Sex - includes protection against sexual harassment; Familial Status - includes the presence of children under the age of 18 and/or pregnancy; National Origin; Sexual Orientation; Gender Identity; Marital Status; Creed; and Age.**

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**Subrecipients hiring personnel to carry out HOME-ARP activities, follow all Equal Employment Opportunity (EEO) policies. These may include the documentation of advertising methodology, demographics for interviewees, and reasons for the hiring decision; to the greatest extent feasible, direct all employment, contract, and training opportunities to low- and very-low-income persons and businesses, including seasonal and temporary employment opportunities; and recruit potential employees residing in lower-income areas and those residing in public or federally assisted housing. Required documentation includes: a summary of the**

number of applicants for each position; the number that are minorities, women, and/or disabled; reasons for the hiring decision; personnel policies; and employee training, promotion, and salary levels.

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Subrecipients must not contract with, hire, or employ an individual in the United States knowing that the contractor or individual is not authorized with respect to such employment.

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Subrecipients are required to comply with the policies, guidelines, and requirements of the Uniform Administration, Cost Principles that require costs be necessary and reasonable, and Audit requirements set forth in 2 CFR Part 200.

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Funds, materials, property, or services, provided directly or indirectly through HOME-ARP, cannot be used for partisan political activity, or to further the election or defeat of any candidate for public office.

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All procurement transactions regardless of whether negotiated or advertised, and without regard to dollar value, shall be conducted in a manner providing a maximum degree of open and free competition.

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Organizations that are directly funded under the HOME-ARP program may not engage in inherently religious activities, such as worship, religious instruction, or proselytization, as part of the programs or services funded through HOME-ARP. If an organization conducts such activities, the activities must be offered separately, in time or location, from the programs or services funded under HOME-ARP, and participation must be voluntary for the beneficiaries of the HOME-ARP programs or services.

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**Q28**

**Yes**

Upon request, applicant agrees to furnish copies of liability insurance coverage, fidelity bond coverage for principal staff handling the organization's accounts, and payment of payroll taxes and worker's compensation insurance coverage, as required by Federal and State laws.

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**Q29**

**Yes**

Upon request, applicant agrees to furnish copies of commitment letters for other funding sources.

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**Q30**

**Yes**

Upon request, applicant agrees to furnish copies of accounting records and other financial documentation.

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**Q31**

Signature of Authorized Responsible Party Entering your full name in the box below will convey the same meaning as a wet signature.

Leonard Smith

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**Q32**

Please enter or click today's **11/17/2023** date below:

Request for Qualification - Part 1 Submittal Date

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#10

**COMPLETE**

**Collector:** Web Link 1 (Web Link)  
**Started:** Friday, November 17, 2023 2:30:32 PM  
**Last Modified:** Friday, November 17, 2023 4:37:23 PM  
**Time Spent:** 02:06:50  
**IP Address:** 35.148.79.110

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## Page 1: Supportive Service Program &amp; Activities

**Q1****Yes**

Have you completed and submitted the HOME-ARP Request for Qualifications - Part 1 online form?

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## Page 2: Supportive Service Program &amp; Activities

**Q2**

Organization Name. Must be the same as entered in the Part 1 - Qualifications online form.

Native American Development Corporation

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**Q3**

Please provide the proposed supportive service program location: (please be specific)

Street Address	<b>310 N. 27th Street</b>
City	<b>Billings, MT</b>
State	<b>MT</b>
Zip Code + 4	<b>59101*1236</b>

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**Q4****Yes**

Is the program location within the Billings city limits?

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**Q5**

Which qualifying populations does your agency propose to serve with HOME-ARP funds? (choose one or more)

**Homeless, as defined in 24 CFR 91.5,**

**At Risk of Homelessness, as defined in 24 CFR 91.5,**

**Fleeing, or Attempting to Flee, Domestic Violence, Dating Violence, Sexual Assault, Stalking, or Human Trafficking**

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**Other Populations including: Other families requiring housing assistance services to prevent homelessness, or those at greatest risk of housing instability**

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**Veterans and Families that include a Veteran Family Member that meets the criteria for one or more of the qualifying populations**

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**Q6**

Which eligible supportive service categories does your agency propose to carry out? (choose one or more)

**McKinney-Vento Supportive Services (see McKinney-Vento Homeless Assistance Act)**

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**Homeless Prevention Services,**

**Housing Counseling Services (must be an HUD approved)**

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**Q7**

Which eligible activities associated with the above service categories does your agency propose to implement? Full descriptions of activities can be found in HOME-ARP Supportive Services: Eligible Costs & Services (Please choose at least one of the following)

**Housing Search and Counseling Services,**  
**Education Services,**  
**Employment Assistance and Job Training,**  
**Food,**  
**Life Skills Training,**  
**Mental Health Services,**  
**Outpatient Health Services,**  
**Outreach Services,**  
**Substance Abuse Treatment Services,**  
**Transportation,**  
**Case Management,**  
**Credit Repair,**  
**Landlord / Tenant Liaison,**  
**Services for Special Populations,**  
**Financial Assistance Costs (e.g., rental application fees, security deposits, utility payments, rental arrears, first, and last month's rent, etc.)**  
 ,  
**Short-term and Medium-term Financial Assistance for Rent**

**Q8**

Describe the need for the proposed supportive services at your organization in relation to homeless prevention and increasing housing stability. (1,000 character maximum)

Since NADC began its clinical and public health services in 2018, we have exceeded expectations, seeing 10,391 cases annually, completing 13,071 training hours, and training 1820 workforce members to date. NADC also partners with almost 100 city, county and community organizations. One of the consistent, critical needs among our service population is housing, and is listed as the #1 need among our NAEP clientele. According to your Allocation Plan, "People need more than just housing; (we) must help address underlying issues of what people actually need to be independent and healthy with supportive services," with affordable housing and supportive services listed as the top needs, including mental health, SUD, case management and counseling services. These are the services NADC provides, with a very high success rate (see response #12), and being able to expand these services will be transformative in reducing homelessness in the Billings area.

**Q9**

**Yes**

Is the above-stated need identified within the City of Billings' HOME-ARP Allocation Plan?

**Q10**

Please estimate the number of qualifying HOUSEHOLDS your agency expects to serve with HOME-ARP supportive services in one year. (Whole numbers only; no ranges, no percentages; a single individual = one household; one family = one household)

350

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**Q11**

What is the organization's timeframe in MONTHS for carrying out the proposed activity? Please enter a whole number (no comma, decimal point, etc.)

48

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### Page 3: Organizational Experience and Capacity

**Q12**

Provide a detailed description of the organization's ability to serve the identified qualifying population(s). Describe similar projects or activities that have been / are being successfully carried out at the organization, as well as sources of funding for the programs or activities. (2,000 character maximum)

NADC's Native American Empowerment Project, funded by SAMSHA, CHW and TOR, is a strong example our capacity to meet the needs of homeless and/or at-risk communities. At the heart of NAEP programming is the 'Empowerment Plan', a needs assessment conducted using NOMS or a similar tool. This assessment is used to develop individualized Empowerment Plans focused on 5 key areas: housing, medical, financial, additional services (education, childcare, etc.), and legal and administrative support. Goals include clear, achievable steps, and are implemented with our team's support, and focused on clients' strengths. Housing is a priority for the majority of our clients. Success rate: In our first 18 months, NAEP has served 270 individuals. Those actively engaged in their Empowerment Plans had higher success: 120 achieved their empowerment goals, and stabilized enough to move onto their long-term goals. This is a success rate of 44% positive performance outcome improvement. NAEP continues to work to re-engage 50 individuals who have not yet achieved their goals, due to additional complexity not identified during intake. The remaining 100 individuals are not eligible due to incarceration or relocation. In addition, Yellowstone County ICWA Court graduate(s) have all been NAEP clients. 30% of STAR court participants are NAEP clients and all in a stabilized status. NADC developed its model to help \*prevent\* homelessness by addressing the social determinants of health. We believe this makes our program stand out. Note: 42% of homeless in Billings are Native American, although they make up only 10% of the pop. As a Native-led, culturally diverse agency, NADC can appropriately service this over-represented portion of the homeless population, and our experience serving high risk populations makes us equipped to serve all homeless individuals and families with care, respect and cultural competency.

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**Q13**

Please explain any identified obstacles to carrying out this activity prior to the expenditure deadline of September 30, 2030. (1,000 character maximum)

There are two obstacles we have identified to carry out this activity. The first is not related to the September 2030 deadline, but rather an ongoing concern of building a program to ensure unduplicated individuals are being properly served through program resources. The second obstacle is to secure funding beyond the first 12 months because this is a complex issue that will not be resolved in the first 12 months. We will approach this program in a proactive/preventative manner rather than a reactive fashion and work to address the upstream and underlying factors contributing to homelessness and risk of homelessness factors in our community.

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**Q14**

Describe how the organization plans to market the program to participants to ensure people know how to access services or resources. (1,000 character maximum)

The organization will utilize several appropriate channels to market the program to participants and the community as a whole. These include but are not limited to connecting and leveraging our Service Provider Partners; the Continuum of Care network, and United Way of Yellowstone County. NADC intends to form an Advisory Board, to include qualifying population members and agency partners to ensure our messaging resonates with participants. We will also produce social media posts and create on-brand posters and/or flyers at points of service. Additionally, agency partner training will be offered virtually two times per year to assist front line staff with understanding the program and being able to be confident in referring clients to the program.

**Q15**

The City has not implemented a preference for any qualifying populations or subpopulations. Describe how the agency will maintain a waiting list of any program participants and/or a waiting list for services. (1,000 character maximum)

NADC-BUIHWC must adhere to all grant-specific requirements. In addition, each program is expected to collect demographic information, obtain written informed consent, complete a basic needs assessment and complete the release of information to coordinate services with area partners and service agencies. A legal custodial parent or guardian must provide written consent for minor participation. Program participation defines a minor as anyone under 18 years of age, which requires consent from a legal representative. After all necessary documentation is completed, participants are either scheduled or added to an appointment waitlist. Individuals on the waitlist are staffed to prioritize needs and assigned a case representative to follow up with an appointment. Waitlists are reviewed weekly to help reduce unnecessary wait times.

**Q16**

Describe how the agency will verify a program participant meets at least one of the qualifying populations prior to service approval. (1,000 character maximum)

Each potential participant will work with a staff member for an initial interview. An intake form will be completed during the interview that will establish qualification for the program. If the participants are determined to be qualified for the program, a plan of action will be jointly developed to outline requirements and next steps, including documentation. A Release of Information form will be completed which will allow program staff to ensure there are not duplicative services being provided.

**Q17**

How will the organization verify the income of the individuals / households served? Check all that apply.

**Client Self-Report,**

**Verified through other assistance (TANF, Medicaid, etc.),**

**Third Party Verification**



**Q18**

Describe how the agency will assess duplication of benefits, including a process for verifying that a program participant is not currently receiving and/or been approved to receive the same service through another funding source. (1,00 characters maximum)

NADC-BUIHWC uses releases of information for all partner and client-specific agencies to safeguard client information and manage supportive services. Participants may sign a release of information, known as authorization, to use or disclose to allow NADC-BUIHWC staff to talk to other service providers and community supports. ROIs must protect human subjects and patients' personally identifiable information (PII) and protected health information (PHI). Staff must ensure the participant or legal representative has granted written permission to share information with outside entities or individuals. Releases are time-sensitive (one year) and may be revoked at any time in writing before expiration. This process is essential for managing multiple community resources available to participants to reduce duplication of services, resources, and financial support.

**Q19****No**

Has any program participant been required to repay due to an overpayment and / or duplication of funds at your agency? If yes, how were repaid funds reinvested into another program participant and / or activity?

**Q20**

Describe the methods or programs the agency will use to document and verify a program participant's eligibility. (1,00 characters maximum)

In addition to collecting income data via third party verification, client self-report and/or verified through other public assistance, NADC uses Center for Mental Health Services (CMHS) National Outcome Measures (NOMS) Client-Level Measures. The collection of NOMS data involves interviewing clients to document info related to their behavioral health diagnosis, demographics, functioning, employment, education, housing, and measures tailored to the grant program. Outcome measures allow us to evaluate a patient's present condition, resulting in a score and categorization of the patient's risk level. This measure is used to establish a pre-intervention baseline. The NOMS tool is administered to clients at baseline, reassessment, and discharge. As outlined above, we also create and monitor each client's progress towards their Empowerment Plan goals in 5 key areas: housing, medical, financial, additional services (education, childcare, etc.), and legal and administrative support.

Page 4: Financial & Staffing

**Q21**

What is the total HOME-ARP funding requested for supportive service activities? (Please enter whole numbers in each field (no dollar sign, comma, decimal point, etc.)

For supportive services activities:

**554197**

For the direct provision of services:

**475426**

**Q22**

**Yes**

If included in the project budget, will the cost of labor or supplies and materials be incurred in directly providing supportive services to program participants? (i.e., direct provision of services)

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**Q23**

If the direct provision of services will be funded, please describe the employee positions to be funded, percentage of time dedicated to the activity, qualifications, and duties in carrying out the proposed activity. (500 characters maximum)

Makayla Weaselboy, Project Coordinator – 100% time; Rosalyn Bigback, Outreach Case Manager, LAC – 100% time; D'Anthony Willis, Community Support Specialist – 100% time; Darrell LaMere, Special Projects Coordinator – 20% time

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**Q24**

Upload job descriptions and resumes of any staff that will directly carry out supportive service activities for program participants.

**Binder1.pdf (806.6KB)**

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**Q25**

Identify the organization's key staff members that will be responsible for HOME-ARP activity oversight, implementation, financial management, and quarterly reporting. Please include specific titles and qualifications. (1,000 characters maximum for each)

Activity Oversight:

**Activity Oversight – Chris O’Brien, Operations Administrator, Billings Urban Indian Health and Wellness Center Oversight duties to include: Oversee the day-to-day operations of the homelessness program, ensuring the effective delivery of services. Monitor and evaluate program outcomes, making adjustments as necessary. Support team’s collaboration with other organizations and agencies to enhance program effectiveness and coordination of services. Provide ongoing support, mentorship, and professional development opportunities for team members. Foster a positive and collaborative work environment that encourages innovation and excellence.**

Implementation:

**Implementation – See #24 for team qualifications and duties. Team members: Makayla Weaselboy, Project Coordinator Rosalyn Bigback, Outreach Case manager, LAC D’Anthony Willis, Community Support Specialist Darrell LaMere, Housing Specialist**

Financial Management:

**Financial Management – Finance Department led by CPA Marilyn Klein. NADC has also contracted WIPFLI to help oversee our financial planning process, including budgeting, forecasting, financial modeling, providing analysis of financial data to support decision-making by executive team. WIPFLI reviews monthly financial statements, reports and annual budget, and implements accounting policies and procedures.**

Quarterly Reporting:

**Quarterly Reporting – Makayla Weaselboy. Data Management and Reporting to include: Maintain accurate and up-to-date records of program activities, including client demographics, services provided, and outcomes. Prepare regular reports for internal and external stakeholders, detailing program progress and outcomes. Utilize data to identify trends, assess program effectiveness, and make informed decisions for improvement. Work with program administrators to develop and manage the program budget. Monitor expenditures, identify cost-saving opportunities, and ensure compliance with funding requirements**

**Q26****No**

If awarded HOME-ARP funding, will the organization hire new staff to implement the project? If yes, the organization must comply with low-income recruitment regulations for positions supported, either in part or in full, with federal funding. Recruitment efforts must include targeting low- and very-low-income individuals, and race/ethnicity documentation must be provided on applicants for any positions supported by federal funding.

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Page 5: New Staff Positions

**Q27****Respondent skipped this question**

Please upload job descriptions for each new position. Acceptable formats PDF, DOC, DOCX, JPG, JPEG

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Page 6: Sources &amp; Uses

**Q28**

Please upload your completed Sources & Uses spreadsheet. Acceptable formats PDF, JPG, JPEG

**Budget\_NADC\_HOME%20ARP.pdf (284.9KB)**

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Page 7: Authorization / Certification / Signature

**Q29**

Please upload the Authorization to Request Funds documentation, signed by the organization's Authorized Responsible Entity. Acceptable formats PDF, JPG, JPEG

**Authorization%20to%20request%20funds%2011-17-23.pdf (24.8KB)**

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**Q30**

Signature: Typing your full name in the box below will be considered signing.

Leonard J. Smith, Jr

**Q31**

Please click or enter the date **11/17/2023** below:

HOME-ARP Request for Qualifications - Part 2 Submittal Date

---

# SECRETARY OF STATE

STATE OF MONTANA

MIKE COONEY

Business Services Bureau  
Rose Ann Crawford, Deputy



Montana State Capitol  
PO Box 202801  
Helena, MT 59620-2801  
(406)444-3665

October 18, 1996

LEONARD J SMITH, JR  
DIRECTOR  
NATIVE AMERICAN MANUFACTURERS  
NETWORK  
207 NO BROADWAY STE BR-1A  
BILLINGS MT 59101

RE: NATIVE AMERICAN  
DEVELOPMENT  
CORPORATION  
ARTICLES OF INCORPORATION  
Date of Filing: October 10, 1996  
Filing Number: D088239-343302

Dear Mr Smith:

Attached please find a copy of the documents you recently filed with this office. The document number and filing date have been recorded on the copy I've attached. These documents serve as your certificate of filing and should be maintained in your files for future reference.

Thank you for giving this office the opportunity to serve you. If you have any questions in this regard, or need additional assistance, please do not hesitate to contact the Business Services Bureau professionals at (406) 444-3665.

Sincerely,

Mike Cooney  
Secretary of State  
Enclosure

FACSIMILE FILED ON 10/10/96  
PURSUANT TO MONTANA CODE  
ANNOTATED. BY SW

343.302  
STATE OF MONTANA  
**FILED**

OCT 10 1996

SECRETARY OF STATE  
DO88239

ARTICLES OF INCORPORATION  
OF

NATIVE AMERICAN DEVELOPMENT CORPORATION

The undersigned incorporator, desiring to form a non-profit Corporation for the purposes hereinafter set forth, pursuant to and in conformity with the Montana Nonprofit Corporation Act, Title 35, Chapter 2, of the Montana Code Annotated, hereby submits the following Articles of Incorporation.

ARTICLE I: NAME

The name of the Corporation is the Native American Development Corporation ("Corporation"). The place in this state where the principle office of the Corporation office is to be located is the city of Billings, Yellowstone County.

ARTICLE II: PURPOSE

The Corporation is organized and shall be operated exclusively for charitable, educational, religious, or scientific purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code. More specifically, the Corporation is organized and shall operate for the following charitable or educational purposes:

1. To combat community deterioration, poverty, unemployment, racial discrimination and prejudice; to reduce neighborhood tensions; to relieve the poor, distressed and underprivileged within poverty-stricken Indian reservations in the United States by:

(a) Assisting in the creation and operation of new non-profit community development corporations on other poverty-stricken Indian reservation to enable them to combat community deterioration, poverty, unemployment, racial discrimination and prejudice; to reduce neighborhood tensions; and to relieve the poor, distressed and underprivileged on their Reservation.

(b) Creating and administering a revolving loan fund available to qualifying residents and locally-owned or locally-operated businesses (including tribal businesses) within a poverty-stricken Indian reservation who make a commitment to provide jobs or training to low income or minority employees residing on such Reservation. Such loans to be made available to qualified recipients at reduced interest rates.

(c) Providing assistance to qualifying new or expanding businesses within poverty-stricken Indian Reservations and who make a commitment to provide jobs or training to low income or minority employees residing on such Reservation. Such assistance includes, but not by way of limitation, providing technical assistance or training in developing entrepreneurial and management skills, market research and assessment, assisting with finding joint venture partners, operational training, and assistance with economic development strategy.

2. To act as a clearinghouse and contact point for state, regional, national, and international economic development organizations and agencies that may provide assistance to combat community deterioration, poverty, unemployment, or racial prejudice or to relieve community tensions on Indian Reservations.

3. To provide educational services, seminars, workshops and conferences to tribal governments, non-profit community development corporations, Reservation-based businesses, governmental entities, and the general public directed at disseminating information and developing strategies to combat community deterioration, poverty, unemployment, racial discrimination and prejudice and/or to relieve the poor, distressed and underprivileged within poverty-stricken Indian Reservations in the United States.

4. To create or assist other Native American non-profit corporations which are organizing for charitable, educational, religious, or scientific purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code, or other applicable Sections of the Internal Revenue Code authorizing the creation of tax-exempt corporations or the conduct of tax-exempt activities.

5. To support or conduct such other or further activities as may be desirable to lessen the burdens of government or to combat community deterioration, poverty, or unemployment on poverty stricken Indian Reservations.

Solely for the above purposes, the Corporation is empowered to exercise all rights and powers conferred by the laws of the State of Montana upon non-profit Corporations, including, but without limitation thereon, the right and power to receive gifts, bequests and contributions in any form, to use, apply, invest and reinvest the principal and/or income therefrom or to distribute the same for the above purposes.

### ARTICLE III: LONGEVITY

The Corporation shall have perpetual existence. The Corporation may also create subsidiary Corporations.

#### ARTICLE IV: REGISTERED AGENT

The address of the registered office of the Corporation is Suite BR-1A, 207 North Broadway, Billings, MT 59101, and the name of the initial registered agent at that office is Leonard J. Smith, Jr.

#### ARTICLE V: OPERATIONAL LIMITATIONS

Notwithstanding any other provisions of these articles, the Corporation shall not carry on any other activities not permitted to be carried on (a) by a Corporation exempt from Federal Income Tax under Section 501(c)(3) of the Internal Revenue Code (or the corresponding provision of any future United States Internal Revenue Law), or (b) by a Corporation contributions to which are deductible under Section 107(c)(2) of the Internal Revenue Code (or the corresponding provision of any future United States Internal Revenue Law).

#### ARTICLE VI: LEGISLATIVE OR POLITICAL ACTIVITIES

No substantial part of the activities of the Corporation shall be the carrying on for propaganda or otherwise attempting to influence legislation and the Corporation shall not participate in or intervene in (including the publishing or distribution of statements) any political campaign on behalf of any candidate for public office.

#### ARTICLE VII: DISSOLUTION

Upon the dissolution of the Corporation, the Board of Directors shall, after paying or making provisions for the payment of all the liabilities of the Corporation, dispose of all the assets of the Corporation exclusively for the purposes of the Corporation in such manner, or to such organization or organizations organized and operated exclusively for charitable, educational, religious, or scientific purposes as shall at the time qualify as an exempt organization or organizations under section 501(c)(3) of the Internal Revenue Code of 1986 (or the corresponding provision of any future United States Internal Revenue Law), as the Board of Directors shall determine. Any such assets not so disposed of shall be disposed of by the State or County Courts in which the principal office of the Corporation is then located, exclusively for such purposes or to such organization or organizations as said Court shall determine which are organized and operated exclusively for such purpose.

#### ARTICLE VIII: INUREMENT OF INCOME

No part of the net earnings of the Corporation shall inure to the benefit of, or be distributed to, its members, directors, officers or other private persons except that the Corporation shall be authorized and empowered to pay reasonable compensation for services rendered.



## ARTICLE IX: PUBLIC BENEFIT CORPORATION

The Corporation is a "public benefit Corporation" within the meaning of Title 35, Chapter 2, of the Montana Code Annotated.

## ARTICLE XI: LIMITATION OF DIRECTOR'S LIABILITY

A director of the Corporation shall not be liable to the Corporation or its members for monetary damages for breach of a director's duties to the Corporation except for (a) breaches of the director's duty of loyalty to the Corporation, (b) acts or omissions not in good faith or that involve intentional conduct or a knowing violation of the law, (c) transactions from which a director derived an improper economic benefit or, (d) conflict of interest transactions, loans to or guarantees for directors and officers or unlawful distributions.

## ARTICLE XII: INCORPORATOR

The name of the incorporator is Leonard J. Smith, Jr. and such incorporator's address is Suite BR-1A, 207 North Broadway, Billings, MT 59101.

## ARTICLE XIII: AMENDMENTS

The Corporation may amend these articles in a manner authorized by law at the time of the amendment.

IN WITNESS WHEREOF, these Articles of Incorporation have been executed in duplicate on this \_\_\_ day of October, 1996.

NATIVE AMERICAN DEVELOPMENT CORPORATION

BY: 

Leonard J. Smith, Jr. (Incorporator)



Native American Development Corp.  
17 North 26<sup>th</sup> Street Billings, MT 59101  
406-259-3804  
[www.nadc-nabn.org](http://www.nadc-nabn.org)

Billings Urban Indian Health and Wellness Center  
1230 North 30<sup>th</sup> Street Billings, MT 59101  
406-534-4558  
[www.billingsurbanindianhealth.org](http://www.billingsurbanindianhealth.org)



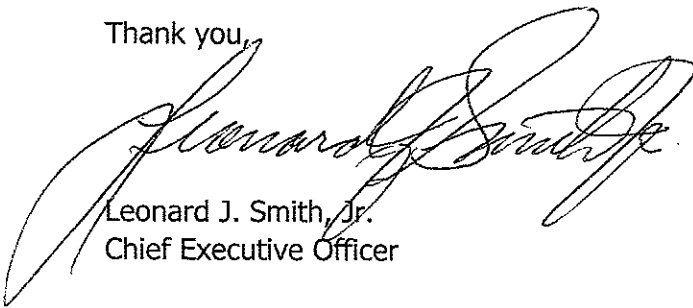
November 17, 2023

Please let this letter serve as the Native American Development Corporation's Authorization to Request Funds in the amount of \$1,029,623 from the City of Billings HOME ARP program.

The purpose of the program and program activities align with our mission, purpose and strategic direction. We believe that successful implementation of this program will further assist community members who are homeless or at risk of being homeless.

Please reach out to me if you have any questions or require additional information on the organization or on the proposed program.

Thank you,



Leonard J. Smith, Jr.  
Chief Executive Officer

BYLAWS  
OF THE  
NATIVE AMERICAN DEVELOPMENT CORPORATION

ARTICLE I

Organization

1. The name of the corporation shall be the Native American Development Corporation ("Corporation"), which is incorporated as a non-profit corporation under the laws of the State of Montana.
2. The business and affairs of the Corporation shall be managed by its Board of Directors ("Board"). The Board shall set policy for the Corporation and oversee and manage the staff and affairs of the Corporation. All of the powers and authority of the Corporation as set forth in the Articles of Incorporation and as authorized by law is vested in the Board.
3. The Board may adopt such rules and regulations for the conduct of their meetings and the management of the Corporation as they deem necessary and proper. Such rules and regulations must be consistent with the Charter of the Corporation, these Bylaws, and the laws of the State of Montana.

ARTICLE II

Meetings

1. *Annual Meetings.* An annual meeting of the Board shall be held during the first three months of the new year at a place selected by the Board and with notice as set forth below.

BYLAWS OF THE NATIVE AMERICAN DEVELOPMENT CORPORATION

2. *Regular Meetings.* Regular meetings shall be held at a time and place selected by the Board for its regularly scheduled meetings with notice as set forth below. Regular, special, or annual meetings may be held by conference call, and any Director may participate in any regular, special or annual meeting by telephone. Any action which may be taken at any meeting of the Board may be taken without such meeting by one or more written documents signed by eight Directors. The written action shall be filed with the Secretary of the Corporation and shall be inserted by the Secretary in the permanent records relating to meetings of the Board.
3. *Special Meetings.* Special meetings of the Board may be called at the request of the Chairman of the Board, four Directors, or the Executive Director. The person or entity calling the meeting may fix the time and place for holding the special meeting and the notice shall state the purpose of the meeting. Special meetings may be called for any purpose which can not await a regular or annual meeting of the Board.
4. *Notice of Meetings.* Notice of the time and place of all Board meetings shall be provided to each Director no less than five days before such Board meeting. If mailed, such notice shall be deemed delivered when deposited in the United States mail, postage prepaid. If sent by a facsimile machine, such notice shall be deemed delivered when the fax is sent and delivery to the responding facsimile machine is confirmed. If sent by electronic mail (E-mail), notice is deemed delivered when transmitted. The proposed agenda for the meeting shall be included in the notice. Under exigent circumstances, the Board may provide less than five (5) days notice of a special meeting so long as the Directors receive actual notice at least two days before the special meeting. If there is a question whether a Director may receive the notice in time, reasonable efforts should be

made to notify the Director by telephone of any special meeting.

5. *Waiver of Notice.* The attendance of a Director at an annual, regular, or special meeting of the Board shall constitute a waiver of notice for that Board member for the meeting attended. However, notice shall not be deemed waived where the Director attends the meeting for the express purpose of objecting to the transaction of any business because the meeting was not properly called or convened.
6. *Continued Meeting.* A Board meeting agenda that is not completed may be continued and completed at another meeting scheduled within ten days of the original meeting without providing additional written notice so long as all Directors are notified in a reasonable manner about the continued meeting.
7. *Place of Meetings.* The Board may designate any place within Montana or Wyoming as the place for holding annual, regular or special meetings called by the Board. If no designation is made as to where to hold an annual or special meeting, the place of the meeting shall be the principal office of the Corporation.

### ARTICLE III

#### Board of Directors

1. *Composition.* There shall be thirteen members on the Corporation's Board of Directors. The size of the Board may be increased or decreased by official resolution of the Board without amending these bylaws. At least seven Directors shall be enrolled members of federally-recognized Indian tribes. No less than ten of the Directors shall be residents of Montana or Wyoming. The Chairperson of the Montana-Wyoming Tribal Leaders Council shall be an ex-official Board member. Board members shall be selected to provide business, governmental, private sector, and non-profit corporation experience to the

ARTICLE IV

Officers

1. *Election.* The Officers of the Board shall be elected annually by the Board at the Annual Board Meeting; provided, however, that the first election of officers shall occur at the first meeting where the entire Board is constituted. All Officers shall serve one year terms. There is no limit on the number of terms an Officer may serve.
2. *Chairman.* The Chairman (or Chairperson) shall preside over all meetings of the Board. The Executive Director shall be accountable to the Chairman on the day-to-day activities of the Corporation. When authorized by the Board, the Chairman may execute deeds, mortgages, bonds, contracts, agreements or other written instruments. The Chairman shall perform all other duties incidental to the Office of the Chairman and such other duties as the Board may prescribe from time to time.
3. *Vice-Chairman.* In the absence of the Chairman, or upon the Chairman's departure or inability to act, the Vice-Chairman (or Vice-Chairperson) shall perform the duties of the Chairman. When so acting, the Vice-Chairman shall have all the powers vested in the Chairman. The Vice-President shall perform such other duties as from time to time may be assigned to the Vice-Chairman by the Chairman or by the Board or that may be incidental to the Office of the Vice-Chairman.
4. *Secretary.* The Secretary of the Corporation shall keep the minutes of the Board meetings and shall ensure that all required notices are duly given in accordance with the requirements of these Bylaws. The Secretary shall ensure that the Corporation's official records are maintained in good order and shall maintain a

register of the mailing addresses and phone numbers of each Director. The Secretary shall generally perform all duties incident to the Office of the Secretary and such other duties as the Board or the Chairman may from time to time assign to the Secretary.

5. *Treasurer.* The Treasurer shall assume responsibility for all funds and accounts of the Corporation; receive and give receipts for moneys due and payable to the Corporation collected from any source; deposit all money or funds received in the Corporation's bank accounts; and generally perform all of the duties incident to the Office of the Treasurer along with such other duties as from time to time may be assigned to the Treasurer by the Chairman or the Board. If required by the Board, the Treasurer shall execute a performance bond for the faithful discharge of the Treasurer's duties. The bond shall be in such sum and with such surety or sureties as the Board shall determine adequate to protect the Corporation.
6. *Other Officers.* The Board may appoint such other officers as the Board deems necessary and convenient.
7. *Removal.* Any Officer elected by the Board may be removed by a vote of eight Directors. Removal shall be based upon the Board's judgment that the best interests of the Corporation would be served by such removal. Any removal provided hereto shall be accomplished at a duly convened Board meeting and the removed Officer shall be provided an opportunity to respond to the grounds for removal..
8. *Vacancies.* Upon the vacancy of any Officer position due to death, resignation, removal, or otherwise, the Board may fill the Officer position for the unexpired term of the office.

ARTICLE V

Quorum

At any annual, special or regular meeting of the Board, the attendance of seven Directors shall constitute a quorum for the purposes of transacting Corporation business. The quorum must be present before any Corporation business may commence. A Director may participate by telephone and need not be present to satisfy a quorum.

ARTICLE VI

Voting

The action taken by the majority of the Directors in attendance at a special, regular or annual meeting of the Board at which a quorum is satisfied shall constitute the official action of the Board. No voting by proxy is allowed. Any Director may submit a verbal or written dissent or explanation for their vote into the record of any meeting, or subsequently filed with the Corporation Secretary.

ARTICLE VII

Resignations

A Director may resign at any time by providing written notice to the Executive Director or Chairman of the Board. Unless otherwise specified in the notice, the resignation shall take effect immediately upon receipt of the notice. Acceptance of the resignation by the Board shall not be necessary to make the resignation effective.

ARTICLE VIII

Compensation

No salary or compensation (other than expense reimbursement) shall be paid to the Directors or Officers for their services as Directors or Officers unless the Board approves of such compensation by resolution. Nothing contained herein shall be



interpreted to preclude any Director from serving the Corporation in any other capacity and receiving compensation for such service so long as the arrangement is approved in advance by the Board and the Director does not comprise his or her duty of care and loyalty to the Corporation.

## ARTICLE IX

### Committees

The Board may, by resolution or official action at a duly called meeting, designate persons from within or outside its Board to serve on standing or ad hoc committees to carry out the duties and business of the Corporation. A majority of the members to any Committee shall be comprised of Directors. Committees shall only have authority to make recommendations to the entire Board. No Committee shall have authority to take official actions, speak, or enter into contracts on behalf of the Board or the Corporation.

## ARTICLE X

### Financial Matters and Audit

1. *Contracts.* The Board may authorize any Officer or agents of the Corporation to enter into any contract or execute and deliver any instrument in the name of or on behalf of the Corporation.
2. *Debt.* Unless authorized by the Board, no loans shall be obtained on behalf of the Corporation and no shall be incurred in the Corporation's name.
3. *Commercial Paper.* All checks, drafts or other orders for the payment of money, notes or other evidences of indebtedness issued in the name of the Corporation shall be signed by Corporation Officers or agents. The Board shall by resolution specify the Officers or agents authorized to sign such checks and commercial paper. All checks and commercial paper issued in the name of the Corporation

shall contain the signature of two authorized Officers or agents of the Corporation.

4. *Deposits.* Consistent with the Treasurer's duties contained in these Bylaws, all funds of the Corporation not otherwise engaged shall be deposited from time to time to the credit of the Corporation in such banks, trust companies or other depositories as the Board may select or direct.
5. *Annual Budget.* The Corporation shall establish an annual budget for the Corporation which shall include an itemization of all anticipated revenues and expenses for the year.
6. *Audit.* The Corporation shall cause the financial reports to be audited at least once every fiscal year and the results of this audit, or any special audit, shall be submitted to the Board. Special audits requested by the Board may be conducted at any time at the request of the Board.

## ARTICLE XI

### Fiscal Year

The fiscal year of the Corporation shall be the calendar year.

## ARTICLE XII

### Conflict of Interest

A Director having a conflict of interest or a conflict of responsibility on any matter involving the Corporation and any other business, person, or pecuniary matter shall refrain from voting on such matter. With respect to any matter which constitutes a conflict of interest or responsibility, or the appearance of a conflict of interest or responsibility, the Director shall disclose such matter to the Board. No Director shall use his or her position as Director for his or her own direct or indirect financial gain.

BYLAWS OF THE NATIVE AMERICAN DEVELOPMENT CORPORATION

The general standards for directors set forth in 35-2-416 MCA, and for officers at 35-2-441, apply.

ARTICLE XIII

Indemnification

1. The Corporation shall indemnify any Director or Officer of the Corporation, who is serving or who has served at the request of the Corporation, against expenses, including attorney fees, judgements, fines, claims, damages, and amounts paid in settlement actually and reasonably incurred by him by reason of the fact that he is or was such Director or Officer in connection with any threatened, pending or completed action, suit or proceeding, whether civil, criminal, administrative or investigative to the extent and according to the procedures and requirements set forth in the non-profit corporation law of the State of Montana. The limitations, requirements and procedures contained in 35-2-446 through 35-2-454 MCA shall apply. The indemnification provided for herein shall not be deemed to restrict the right of the Corporation to indemnify employees, agents and others as permitted by law.
2. The indemnification provided by Section 1 of this Article shall not be deemed exclusive of any other rights to which those seeking indemnification may be entitled under the law or any agreement, vote of disinterested Directors, or otherwise, both as to action in such person's official capacity and as to action in another capacity while holding such office, and shall continue as to a person who has ceased to be a Director or Officer and shall inure to the benefit of the heirs, executors and administrators of such a person.

ARTICLE XIV

Fiscal Year

The fiscal year of the Corporation shall be the calendar year.

ARTICLE XV

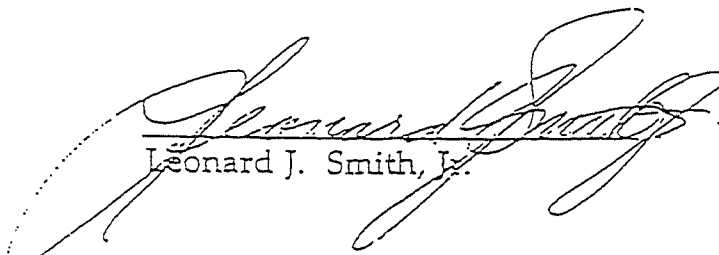
Amendments

These Bylaws may be altered, amended or repealed by a vote of eight of the Directors present at a duly called meeting. Unless waived in accordance with Montana law and these Bylaws, advance written notice of the intent to amend the Bylaws shall be provided to all Directors at least seven days prior to the Board meeting at which the Amendment is proposed, and a copy of the Amendment shall be provided to each Director.

\*\*\*\*\*

APPROVAL

These by-laws were approved by the incorporator of the Native American Development Corporation on the 12<sup>th</sup> day of December, 1996.

  
Leonard J. Smith, Jr.

Attest:

Francine Spang-Bear Don't Walk

4:02 PM

07/21/23

Accrual Basis

## Native American Development Corporation

## Summary Balance Sheet

As of December 31, 2022

	Dec 31, 22
<b>ASSETS</b>	
Current Assets	
Checking/Savings	4,320,974.98
Accounts Receivable	773,534.35
Other Current Assets	15,656.39
Total Current Assets	5,110,165.72
Fixed Assets	1,210,790.69
Other Assets	753,209.35
<b>TOTAL ASSETS</b>	<b>7,074,165.76</b>
<b>LIABILITIES &amp; EQUITY</b>	
Liabilities	
Current Liabilities	
Accounts Payable	5,745.07
Credit Cards	19,914.90
Other Current Liabilities	339,678.44
Total Current Liabilities	365,338.41
Long Term Liabilities	1,046,408.52
Total Liabilities	1,411,746.93
Equity	5,662,418.83
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>7,074,165.76</b>

## Native American Development Corporation

## Profit &amp; Loss

07/20/23

Accrual Basis

October through December 2022

	Oct - Dec 22
Income	
4000 · Grant Income(Funds)	3,016,502.34
4010 · In-Kind Contributions	13,174.44
4100 · Non-Governmental Grant Income	46,248.85
4210 · RLF Loan - Interest Income	300.34
4300 · Business Fees Income	1,668,126.32
4400 · Building Income	15,105.95
4500 · Miscellaneous Income	163,487.48
4600 · Third Party Billing	1,403,513.26
Total Income	6,326,458.98
Gross Profit	6,326,458.98
Expense	
5000 · Payroll	895,448.34
5200 · Contracted Services	264,958.03
5300 · Nonpersonnel	81,707.92
5400 · Facility	199,488.41
5500 · Travel	50,064.81
5600 · Other	211,122.09
5900 · In-kind Expenses	13,174.44
6000 · Non-Cash Expenses	
6100 · Depreciation	6,089.73
6500 · Other Non-Cash Expenses	1,709.85
Total 6000 · Non-Cash Expenses	7,799.58
Total Expense	1,723,763.62
Net Income	4,602,695.36

## Native American Development Corporation

## Statement of Cash Flows

October through December 2022

	Oct - Dec 22
<b>OPERATING ACTIVITIES</b>	
Net Income	4,602,695.36
Adjustments to reconcile Net Income to net cash provided by operations:	
1200 · Accounts Receivable:1210 · Contracts/Grant Receivables	6,460.00
1200 · Accounts Receivable:1220 · Employee Receivables	-494.20
1200 · Accounts Receivable:1230 · Related Party Receivables	31,040.44
1200 · Accounts Receivable:1280 · Sponsorships & Donations	-17,889.04
1261 · Accrued Loan Interest	871.81
1300 · Due from Grants	368,352.29
1240 · Other Receivable	115.95
1400 · Prepaid Expenses:1410 · Prepaid Expenses - General	268.57
2000 · Accounts Payable	-257,791.48
2100 · Credit Cards:2111 · MC - Travel - 9045 NEW 7413	-3,408.07
2100 · Credit Cards:2112 · MC -Marilyn-AP 5059(9037)(4767)	-14,047.83
2100 · Credit Cards:2114 · MC - Mary - 9185	-3,662.42
2100 · Credit Cards:2119 · MC - Robert Much - 9102	-186.82
2100 · Credit Cards:2120 · MC - Marshall Lucas - 5534	-2,631.58
2100 · Credit Cards:2122 · MC - Johnel Barcus- 7088	-440.25
2100 · Credit Cards:2130 · Dell Financial Services	-936.00
2200 · Deferred Income:2210 · Deferred Income - CDFI & SAMHSA	-163,169.40
2200 · Deferred Income:2212 · Deferred Income - IHS COVID 19	-116,779.29
2200 · Deferred Income:2214 · Deferred Income - MCUIH	-691,073.73
2200 · Deferred Income:2214 · Deferred Income - MCUIH:2214.01 · Deferred Income - MICUIH - BSCC	-10,000.00
2200 · Deferred Income:2216 · Deferred Income - ARPA	-1,859,385.46
2200 · Deferred Income:2250 · Deferred Income - BUIHWC	-543,591.85
2200 · Deferred Income:2250 · Deferred Income - BUIHWC:2250.01 · Deferred Income - Third Party	-1,057,831.70
2200 · Deferred Income:2261 · Deferred Income - Misc	-112,952.98
2300 · Current Line of Credit:2310 · WF Line of Credit 0914	-578.00
2300 · Current Line of Credit:2340 · FIB Line of Credit 9095	373.97
2400 · Payroll Liabilities:2401 · Accrued Payroll	-116,811.79
2400 · Payroll Liabilities:2402 · Accrued Fringe	-27,312.80
2400 · Payroll Liabilities:2403 · Accrued Payroll Taxes	-18,895.45
Net cash provided by Operating Activities	-9,691.75
<b>INVESTING ACTIVITIES</b>	
1600 · Capital Assets:1641 · AD-Buildings	6,089.73
1700 · RLF Loan Receivables:1740 · RLF - CDFI:1710.01 · Lame Deer Trading Post	4,314.38
1700 · RLF Loan Receivables:1740 · RLF - CDFI:1710.02 · Silver Wolf Enterprises	439.11
1700 · RLF Loan Receivables:1740 · RLF - CDFI:1710.05 · American Indian Consulting Ser.	25,000.00
1700 · RLF Loan Receivables:1740 · RLF - CDFI:1710.06 · Northern Arapaho Tribal Indust.	4,521.36
1700 · RLF Loan Receivables:1750 · RLF - MBDC:1710.13 · Extreme Clean	3,127.89
1700 · RLF Loan Receivables:1750 · RLF - MBDC:1710.14 · NACDC Financial Services Inc.	2,476.11
1700 · RLF Loan Receivables:1750 · RLF - MBDC:1710.15 · Two Whistle Construction	35,106.54
1700 · RLF Loan Receivables:1750 · RLF - MBDC:1710.16 · Sacred Trails & Guides Outfitte	4,000.00
1700 · RLF Loan Receivables:1750 · RLF - MBDC:1710.19 · P. F. Brown Construction	11,648.43
Net cash provided by Investing Activities	96,723.55
<b>FINANCING ACTIVITIES</b>	
2500 · Long Term Liabilities:2510 · Note Payable - Building	-2,736.17
Net cash provided by Financing Activities	-2,736.17
Net cash increase for period	84,295.63
Cash at beginning of period	4,236,807.35
Cash at end of period	<u>4,321,102.98</u>



**Native American Development Corporation  
Board of Directors  
Contact information**

- 1) Ernest “Mike” Lawson, NADC BOD Chairman  
Enrolled Member of Northern Arapaho Tribe**
- 2) Jade Bahr, NADC BOD Vice Chairman Member  
of the Northern Cheyenne Tribe**
- 3) William “Bill” Benjamin, NADC BOD Treasurer  
Enrolled Member of the Blackfeet Tribe**
- 4) Deanna Comeau, NADC BOD Member Member  
of Winnebago Tribe**
- 5) Sam Painter, NADC BOD Member  
Member of Fort Belknap Tribe**
- 6) Jacqueline Whiteman, NADC BOD Member  
Member of The Crow Tribe**
- 7) Lorrie Capjohn-Wolf, NADC BOD Member  
Member of Sun’aq Tribe of Kodiak**



INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date:

MAR 09 2001

NATIVE AMERICAN DEVELOPMENT  
CORPORATION  
207 N BROADWAY BR-1A  
BILLINGS, MT 59101-1951

Employer Identification Number:  
81-0512124

DLN:

17053041743001

Contact Person:

DAVID V SCIAN

ID# 31369

Contact Telephone Number:

(877) 829-5500

Our Letter Dated:

May 1997

Addendum Applies:

No

Dear Applicant:

This modifies our letter of the above date in which we stated that you would be treated as an organization that is not a private foundation until the expiration of your advance ruling period.

Your exempt status under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) is still in effect. Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Code because you are an organization of the type described in section 509(a)(1) and 170(b)(1)(A)(vi).

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(1) organization.

You are required to make your annual information return, Form 990 or Form 990-EZ, available for public inspection for three years after the later of the due date of the return or the date the return is filed. You are also required to make available for public inspection your exemption application, any supporting documents, and your exemption letter. Copies of these documents are also required to be provided to any individual upon written or in person request without charge other than reasonable fees for copying and postage. You may fulfill this requirement by placing these documents on the Internet. Penalties may be imposed for failure to comply with these requirements. Additional information is available in Publication 557, Tax-Exempt Status for Your Organization, or you may call our toll free number shown above.

If we have indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

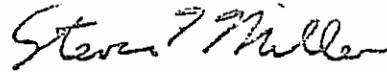
Letter 1050 (DO/CG)

NATIVE AMERICAN DEVELOPMENT

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,

A handwritten signature in cursive script that reads "Steven T. Miller".

Steven T. Miller  
Director, Exempt Organizations



Native American Development Corporation (NADC) and the Billings Urban Indian Health & Wellness Center (BUIHWC)

<b>Department:</b> Key Staff	<b>Job Description</b>
<b>Job Title:</b> Project Manager	<b>FLSA Status:</b> Exempt
<b>Reports To (Title):</b> Chief Executive Officer	<b>Position Status:</b> Full-time
<b>Prepared By:</b> Associated Employers/HR	<b>Revision Date:</b> 12-01-2020
<b>Supervises:</b> Non-supervisory position	

**Job Summary:**

Under the direction of the Chief Executive Officer, the Project Manager advises the organizational leadership, BUIHWC Center Director and NADC COO on key projects assigned (both for clinic and NADC). The Project Manager is responsible for coordination of proposal writing, implementation of project goals, execution, management of project budgets, timelines as required for completion of project, while remaining aligned with organizational strategy, commitments and goals.

The Project Manager must maintain the highest level of integrity and lead by example in all areas. Specific duties include but are not limited to:

**Essential Duties and Responsibilities and Expectations:**

**I. Planning**

- a. Assist in the definition of project scope and objectives, involving all relevant stakeholders and ensuring technical feasibility
- b. Research and prepare proposals for project funding
- c. Creating long- and short-term plans, including setting targets for milestones, adhering to deadlines, and ensure resource availability and allocation
- d. Obtain adequate funding to carry projects to completion
- e. Develop detailed project plans to monitor and track progress
- f. Perform risk management to minimize liabilities of multiple projects
- g. Serving as a point of contact for teams when multiple units are assigned to the same project to ensure team actions remain in synergy
- h. Communicating with executives and the board to keep the projects aligned with their goals

**II. Compliance**

- a. Ensure that NADC-BUIHWC is in compliance with internal policies and relevant external regulations.
- b. Adhere to requirements of funding sources and coordinating with GrantVantage software
- c. Performing quality control on the project throughout development to maintain the standards expected

**III. Project Management**

Project management responsibilities include the coordination and completion of projects on time within budget and within scope. Oversees all aspects of projects assigned. Sets deadlines, assigns responsibilities and monitors and summarizes progress of project. Prepares reports for upper management regarding status of project.

- a. Coordinate internal resources and third parties/vendors for the flawless execution of projects
- b. Establish and maintain relationships with third parties/vendors
- c. Manage the relationship with potential partners and all stakeholders
- d. Develop comprehensive project plans to be shared with clients as well as other staff members
- e. Create and maintain comprehensive project documentation
- f. Track project performance, specifically to analyze the successful completion of short and long-term goals
- g. Measure project performance using appropriate tools and techniques
- h. Meet budgetary objectives and make adjustments to project constraints based on financial analysis
- i. Assist program managers in delegating tasks to employees assigned to the project.
- j. Assist program managers in motivating people involved in the project to complete tasks on time
- k. For issues that affect the project, report and relay to management in a timely manner so appropriate adjustments can be made
- l. Making effective recommendations to management when presented with multiple options on how to progress with the project
- m. Manage changes to the project scope, project schedule and project costs using appropriate verification techniques
- n. Adjusting schedules and targets on the project as needed
- o. Ensure that all projects are delivered on-time, within scope and within budget
- p. Perform related work as required, including support services and other duties as assigned

**Minimum Qualifications (Experience/Education):**

- Bachelor's Degree from an accredited college or university in project management, business administration, or closely related field; and a minimum of three years of directly-related work experience in project management; or a combination of education and experience deemed appropriate for the duties and responsibilities of this position that will meet these qualifications.
- Theoretical and practical project management knowledge is required
- Experience in strategic planning, risk management and/or change management
- Proficiency in project management software tools
- Project Management Professional (PMP) certification from Project Management Institute (PMI) or equivalent is preferred
- Experience working with American Indian populations preferred.
- Master's degree in a relevant field is a plus.

**CERTIFICATES, LICENSES, REGISTRATIONS**

- Must have valid Montana State driver's license.

**SPECIAL REQUIREMENTS**

- Expertise with computerized grant administration and the operation of modern office equipment, computers, and word processing, spreadsheet, database management, presentation and communication tools will be needed for this position.
- Must meet all annual training and system requirements to maintain access to required computer systems.
- Must maintain proper licensure/certification and registration; if required.
- Must participate in and support HIPAA training, as needed and required.
- Must adhere to NADC policies regarding professional conduct.
- Must participate in pre-hire drug test and random drug tests thereafter, if required.
- Must pass a background check.
- May be required to attend evening meetings to participate in organization-sponsored events.
- Travel as required in order to meet the roles and responsibilities.

**Competencies or Knowledge, Skills and Abilities (KSA's):**

This position requires excellent verbal and written communication skills, the ability to work independently while staying accountable, and to work with a wide variety of individuals and organizations. The position must be client focused with a strong customer-service objective. All project development work is done in a manner that maintains and protects the confidentiality of any and all client and organizational information, as guided by NADC's personnel policies.

- Must have excellent project management skills with experience in managing and supervising administrative projects
- Must have a working knowledge of Federal, State and private foundation grant/loan programs, and knowledge of Federal and State rules and regulations for grant/loan programs
- Must have working knowledge of grant management information systems, financial reporting, and federal and state fiscal management rules and regulations.
- Must have a thorough understanding of the organization's overall business and its objectives
- Must possess working knowledge of planning and strategizing financial and budgeting issues
- Demonstrates competency in establishing and maintaining effective working relationships with providers, management, employees, and contacts outside the organization
- Must be skilled in accomplishing a large workload with demanding timelines, and multiple tasks/deadlines; and demonstrates ability to effectively handle stressful situations
- Must be skilled in solving complex situations with varying interests; finding solutions considering various factors; managing challenging situations; effective communication; and work productively in a team atmosphere with minimal supervision
- Proficient in using Microsoft Office applications (Word, Excel, Access, Outlook), grant management software programs, and internet resources.
- Skill in operating a personal computer and its software, including word processing, spreadsheets, Power Point, along with telephone, 10-key, calculator, copy machine, fax machine and other modern office equipment
- Proven ability to work with others at all levels within the organization and collaborate effectively across levels.
- Ability to write creatively and persuasively, with correct grammar, spelling, and punctuation
- Ability to understand and follow specific instructions and guidelines, and complex oral and written instructions
- Ability to work with diverse agencies, groups and individuals, using active listening skills
- Ability to quickly learn and put to use new skills and knowledge brought about by rapidly changing business and non-profit information and/or technology
- Ability to maintain and protect the confidentiality of any and all client and organizational information under the guidelines of the personnel policies

**Physical Demands & Working Conditions:**

- Work is primarily in an office environment.
- Incumbent must be able to perform computer, data entry and word processing related tasks for a majority of the workday, as required.
- Frequently sit, with continuous full use of hands, repetitive movement, keyboarding, and clear vision, as well as speak and hear normal conversation.
- Requires high attention to detail with frequent deadlines, and internal and external social interaction.
- Incumbent must move, stand, bend, or kneel on an intermittent basis.
- Requires intermittent, moderate physical effort, moving or carrying 5 to 25 pounds.
- Incumbent is occasionally exposed to on-street driving and moving vehicles with an overnight stay away from home.
- Work hours are generally Monday through Friday, 8AM to 5PM, but will include early morning and/or evening meetings and events.

**Employee Acknowledgement:**

*The above statements are intended to describe the general nature and level of work being performed by the individual assigned this position. This job description is not intended to be an exhaustive list of all responsibilities, duties and skills of the personnel in those positions(s).*

*I have read and accept the duties and responsibilities as outlined. I have also been given the opportunity to discuss any questions or concerns regarding any or all of the above directly with my supervisor prior to signing this document. Further, I agree to notify my supervisor immediately in the event that I am unable to fulfill any or all of the duties as outlined above.*

*I understand that **NADC-BUIHWC** reserves the right to revise or change this job description as the need arises.*

*I understand the position is funded with discretionary funding. At the expiration of the funding agreement, the position will be discontinued.*

*I have reviewed this job description and received a copy.*

Employee Signature: \_\_\_\_\_/Date: \_\_\_\_\_

Supervisor Signature: \_\_\_\_\_/Date: \_\_\_\_\_

**NADC-BUIHWC** is an Equal Opportunity Employer. **NADC-BUIHWC** does not discriminate on the basis of race, religion, color, sex, gender identity, sexual orientation, age, non-disqualifying physical or mental disability, national origin, veteran status or any other basis covered by appropriate law. All employment is decided on the basis of qualifications, merit, and business need.

# MAKAYLA WEASELBOY

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## OBJECTIVE

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I am looking to gain experience in the Mental Health field. I am currently studying for my bachelor's degree in psychiatric rehabilitation. My end goal is to eventually become an LCPC.

## SKILLS & ABILITIES

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Leadership skills, communication skills, organization skills, time management skills, great problem solver, conflict resolution, active listening, decision making, customer service, teamwork.

## EXPERIENCE

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- |                            |  |
|----------------------------|--|
| March 2017-<br>Current     | Lead Infant Room Teacher, <i>Americas Future</i> <ul style="list-style-type: none"><li>· In charge of day to day activities, oversight of staff and children, ensuring children are meeting educational milestones and are in a safe and nurturing environment while meeting individual needs. Over 200 hours of early childhood training.</li></ul> |
| August 2010-<br>March 2017 | Early Childhood Director, <i>Bright Little Stars</i> <ul style="list-style-type: none"><li>· Oversight of day to day operations including staff and children. Licensing, food program, ensuring lesson plans and meals were provided.</li></ul>  |

## EDUCATION

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- |                          |  |
|--------------------------|--|
| August 2006-<br>May 2010 | High School Diploma, Billings MT, <i>Billings Senior High</i>                                    |
| April 2019-<br>Current   | <i>Bachelor's Degree-Psychiatric Rehab with a minor in psychology, Billings MT, MSU-Billings</i> |

## LEADERSHIP

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Leading staff meetings, classroom meetings, creating and implementing staff evaluations, hosting and leading parent meetings.



Native American Development Corporation and the Billings Urban Indian Health & Wellness Center

Department: COVID-19 ERSP Project	Job Description
Job Title: Outreach Case Manager	FLSA Status: Exempt
Reports To (Title): COVID-19 ERSP Project Director	Position Status: Full time Temporary
Prepared By: Aaron Edenshaw, LMSW, LCSW	Revision Date: 11/3/2021
Supervises: NA	

**Job Summary:**

The Outreach Case Manager is responsible for providing Native American community members age 25 years or older with outreach case management services in Yellowstone County. This position will assist the project director in many aspects of the project. The outreach case manager will collaborate with NADC-BUIHWC staff members to develop and/or implement services for the benefit of the target population served by the COVID-19 ERSP Project. Responsible for capturing, reporting, and documenting project data. Adheres to grant guidelines and principles of SAMHSA. Maintains efficient communication to foster positive relationships with community partners. Seeks to develop professional relationships in the community that further the goals of the program. The COVID-19 ERSP project seeks to address the needs of domestic violence victims in Yellowstone County. Provides outreach case management services to individuals age 25 years or older seeking domestic violence shelter and related resources.

The outreach case manager will administer service tool questions and transpose raw data collected using the National Outcome Measures (NOMs) client-level measures tool. Responsible for administering service tool questions at baseline, every six months while receiving treatment, and upon discharge.

The position is established for the COVID-19 ERSP Project and will be funded over the course of the project. Grant funding will expire December 14, 2022.

**Essential Duties and Responsibilities and Expectations:**

- Assist Project Director in various aspects of the project.
- Conducts community outreach to inform prospective patients of behavioral health services available at BUIHWC.
- Assists in connecting prospective patients to BUIHWC patient registration to register for services.
- Completes NOM's service tool questionnaire with participants at required intervals.
- Reviews NOM's documentation for deficiencies and completeness ensuring readiness for abstracting data entry and completing patient demographic information.
- Assists in scheduling and coordinating services in the community as needed.
- Familiar with community resources available to Native Americans in Yellowstone County.
- Provides outreach and case management to connect participants with social services in the community (i.e. workforce development center, housing services, homeless shelters, domestic violence shelters, food assistance, etc.).



- Implements goals and objectives with the Project Director.
- Works with community partners to support mutual efforts and successfully accomplish project objectives.
- Performs general office functions i.e. answering phones, email, correspondence, greeting participants, scheduling, cancellations, etc.
- Local travel as required to fulfill project roles and responsibilities.
- Participate in staff meetings, prevention meetings, and trainings as required or needed.
- Prepare quarterly and annual reports as required by Project Director.
- Attend and represent BUIHWC at required meetings and other meetings as assigned.
- Perform other duties as assigned in order to meet BUIHWC's mission and the goals and objectives of COVID-19 ERSP Project.

**Minimum Qualifications (Experience/Education):**

- Bachelor's degree in Public Health, Behavioral Health, or two years' experience in case management.
- Experience providing case management services and community outreach in Yellowstone County, Montana.
- Experience with crisis intervention and triage preferred.
- Demonstrated ability to work collaboratively with others in order to achieve meaningful results.
- Ability to present ideas, transmit information, and/or convey concepts to individuals or groups of people of varying educational, cultural, and experiential levels.
- Experience administering survey questionnaires and data entry.
- Education, experience, or knowledge in suicide prevention and early intervention.
- Knowledge of HIPAA, patient confidentiality, and mandatory reporting requirements.
- COVID-19 vaccination required.
- Experience documenting in electronic health record and telehealth applications.

**Competencies or Knowledge, Skills and Abilities (KSA's):**

- Knowledge of 12 federally recognized tribes in Montana and local Native American population through work experience, academic background, and/or training.
- Knowledge of how to provide services that are culturally appropriate.
- Knowledge of best practices in suicide treatment and prevention.
- Knowledge of public mental health and related human services fields.
- Experience in working with evidence-based practice models and approaches.
- Use effective communication with diverse audiences in groups and individually by employing active listening and the use of clear, concise verbal and written communication that is accurate, timely and courteous.

**Physical Demands & Working Conditions:**

- Position is expected to interact in-person and virtually with adults 25 years old in physical activities, such as hiking, walking, bending, stooping, kneeling, squatting, crouching, balancing reaching overhead, pulling, pushing, talking, hearing/listening, and climbing stairs.
- Frequently sitting, with continuous full use of hands in repetitive hand motion, such as typing.
- Clear vision, as well as speak and hear with normal conversations.
- Requires high attention to detail with frequent deadlines and internal and external social interaction.

- Regular lifting, moving and carrying items 5-30 pounds. Occasionally lifting items up to 75 pounds.
- Work is primarily in an office environment. Must be able to work within an office/clinic/at-home setting, with flexibility to change settings as needed.
- Occasional outdoor environment for physical activities described above.
- Occasionally exposed to on-street driving and moving vehicles with overnight stays away from home.
- Work hours are generally Monday through Friday, 8AM-5PM, but will include early morning, evenings and weekend events.

**NADC-BUIHWC** is an Equal Opportunity Employer. **NADC-BUIHWC** does not discriminate on the basis of race, religion, color, sex, gender identity, sexual orientation, age, non-disqualifying physical or mental disability, national origin, veteran status or any other basis covered by appropriate law. All employment is decided on the basis of qualifications, merit, and business need.

*The above statements are intended to describe the general nature and level of work being performed by the individual assigned this position. This job description is not intended to be an exhaustive list of all responsibilities, duties and skills of the personnel in those positions(s).*

*I have read and accept the duties and responsibilities as outlined. I have also been given the opportunity to discuss any questions or concerns regarding any or all of the above directly with my supervisor prior to signing this document. Further, I agree to notify my supervisor immediately in the event that I am unable to fulfill any or all of the duties as outlined above.*

*I understand that **NADC-BUIHWC** reserves the right to revise or change this job description as the need arises.*

*I have reviewed this job description and received a copy.*

Employee Signature: \_\_\_\_\_/Date: \_\_\_\_\_

Supervisor Signature: \_\_\_\_\_/Date: \_\_\_\_\_

11/10/2021

Aaron Edenshaw, LMSW, LSCW  
COVID-19 ERSP Project director BUIHWC

The Outreach Case Manager position was brought to my attention, and I think that I would make an excellent candidate for it. Currently I provide professional Substance Use Disorder counseling and guidance to clients. I feel that I meet all your requirements. In addition to this I would like to work for an organization like yours that has a reputation for ensuring that clients requiring support always receive the best care available.

During my 3 years in this field, I have helped my clients to overcome challenges related to poverty, homelessness, behavioral and SUD related issues. I have worked extensively with the Native American population in my current position and on the Northern Cheyenne Reservation volunteering and serving in the community.

I can comfortably work on a multi-disciplinary treatment team providing case management in community-based setting and also one on one basis.

Attached is my resume for your consideration. I very much look forward to hearing from you in the near future.

Thank you,

*Rosalyn Bigback, LAC*

# ROSALYN BIGBACK

## Summary

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Licensed Addiction Counselor with 3 years' experience in healthcare. Knowledgeable understanding of Federal Health Care System as well as Federally Qualified Healthcare Center functioning. Experienced in interviewing and hiring processes. Detail-oriented and passionate about facilitating excellent patient care with a primary focus on Integrated Health Care Model. High ambition to seek insight for improved, highly innovative healthcare for SUD and behavioral health needs.

## Skills

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- Strong verbal communication
- Team leadership
- Public Speaking
- Counseling, Staff management skills
- Crisis intervention
- Skilled in Motivational Interviewing
- Knowledge of policy and procedure development
- Employee Interviewing and hiring process knowledge.
- Complying with regulatory guidelines
- Improving clinical quality outcomes
- Developing training programs
- Strong knowledge and development of MAT program- (Suboxone)
- Knowledge of the Integrated model to provide patient holistic care.
- Prime for life certification- teaching class virtual and in person.

## Experience

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One Health (formerly Bighorn Valley Health Care) | Hardin, MT

### Licensed Addiction Counselor

- Manage all aspects of the care for the patient from date of entry to discharge
- Evaluation of patients' physical and mental health.
- Evaluation and documentation using ASAM and DMS-IV criteria to indicate placement and follow guidelines for dependence/abuse diagnosis.
- Conduct research as needed to develop new treatment methods and to stay up-to-date on changes within the field.
- Counsel patients by listening to stories, concerns or issues and providing feedback, including teaching them coping techniques and offering advice on their current situations.
- Identified treatment goals based on individual diagnosis and history.
- Worked with CPS and court referrals to design treatment plans specific to client needs.
- Educated patient on treatment options, methods, and techniques to ensure the patient understands
- Identified behaviors that interfere with treatment
- Collaborating with Behavioral health team, as well as medical teams to help care for patient in a holistic manner
- Provide continuing care (level 1) for MAT patients within our seven (7) One Health sites, mostly via telehealth.

Big Horn Valley Health Center | Hardin,  
MT

**Behavioral Health Care Manager**

- Core member of collaborative Behavioral Health/Substance Abuse Treatment Team collaborating with Primary Care Providers, Nurses, Pharmacists, and other Behavioral Health Team members.
- Screen and assess patients for common mental health disorders, provide patient education about common disorders and available treatment.
- Monitor patients for changes in clinical symptoms and treatment side effects or complications.
- Active Team member for the Medication Assisted Treatment Team focusing on policy development, treatment adherence, side effects, as well as other complications and effectiveness of treatment.
- Track patients follow up and clinical outcomes in excel based registry.
- Collaborated with multi-disciplinary staff to improve overall patient care and response times.
- Created and maintained facility documents and records, maintaining accuracy while managing sensitive data.
- Solicited medical history information from patients to provide the best and most effective medical advice.
- Assist in training, reporting and other requirements of various grant supported programs.
- Trained new hires and teams in the integrated approach to healthcare at BVHC clinic as well as satellite clinics which required monthly travel.

Big Horn Valley Health Center/ Hardin  
Mt.

**ACLC, Licensed Addiction Counselor  
Candidate**

- Screening and assessing patients for substance use disorders and facilitating and implementing treatment plans.
- Providing patient education about common mental health and substance use disorders and available treatment options.
- Monitoring patients (in person, telephone or telehealth) for changes in clinical symptoms and treatment of side effects or complications.
- Supporting and closely coordinating behavioral health with the patient's primary care provider and other treating specialists.
- Supporting Medication Assisted Treatment (MAT) medication management prescribed by PCP's focusing on treatment adherence, side effects and other complications, and effectiveness of treatment.
- Participate in multi-disciplinary team-based care of patients/clients and consults with team members of primary care and behavioral health teams.
- Schedule and conduct group and individual (level 1)
- Provide behavioral health therapy services based on clinically researched modalities: i.e.: CBT, DBT, Strength Based Therapy etc.

Everything Beautiful Thrift Store |  
Lame Deer, MT  
**Cashier/ Mentor**

- Outreach support to the community
- Detail oriented
- Handle multiple responsibilities while delivering exceptional customer service.
- Interpersonal skills
- Interacting and mentoring T.A.N.F. recipients and other volunteers through the ministry service offered by thrift store.
- Evaluate the work of staff and volunteers to ensure that programs are of appropriate quality and that resources are used effectively.
- Evaluate the work of volunteers to ensure that programs are of appropriate quality and that resources are used effectively.
- Provide direct service and support to individuals or community programs.

## Education and Training

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University of Montana | Missoula, MT  
**2 +2 Social Work BA Program**  
*08/2021- current*

Chief Dull Knife College | Lame Deer, MT  
**Associate of Arts- Addiction Studies**  
*05/2018*

Montana State University - Billings | Billings, MT  
**General Studies**  
*08/2007*

## Education and Training Continued

Licensed Addiction Counselor- State of Montana  
BBH-LAC-LIC-42731  
*03/05/2020- current*

Licensed Peer Support- State of Montana  
BBH-BHPS-CRT-35304  
*12/18/2018- 12/31/2020*

BLS Provider- One Health Hardin, MT  
*4/30/2021-current expires 2023*

Engage Therapy Training  
University of Washington 2020

CIDP/De-escalation training  
November 2020

LGBTQ+ Healthcare Allies  
August 2021

Prime For Life Certification  
August 2020

MRT Certified Moral  
Reconciliation Therapy  
April 2019



Native American Development Corporation and  
the Billings Urban Indian Health & Wellness Center

<b>Department: COVID-19 ERSP Project</b>	<b>Job Description</b>
<b>Job Title:</b> Community Support Specialist	<b>FLSA Status:</b> Exempt
<b>Reports To (Title):</b> Clinic Director	<b>Position Status:</b> Full time
<b>Prepared By:</b> Makayla Weaselboy	<b>Revision Date:</b> 1/10/2023

**Job Summary:**

Native American Development Corporation is hiring for a Community Support Specialist for the COVID-19 ERSP grant. A Community Support Specialists have caseloads which are comprised of Native American community members who are 25 years and older. The purpose of the position is to provide support and help clients develop connections to thrive in the urban setting. The community support specialist will collaborate with NADC-BUIHWC staff members to develop and/or implement services for the benefit of the target population served by the COVID-19 ERSP Project. The COVID-19 ERSP project seeks to address the needs of domestic violence victims in Yellowstone County.

The community support specialist will administer service tool questions and transpose raw data collected using the National Outcome Measures (NOMs) client-level measures tool while capturing, reporting, and documenting project data. The position is established for the COVID-19 ERSP Project and will be funded over the course of the project. Grant funding will expire on December 14, 2023.

**Essential Duties and Responsibilities and Expectations:**

- Adheres to grant guidelines and principles of SAMHSA.
- Maintains efficient communication to foster positive relationships with community partners.
- Seeks to develop professional relationships in the community that further the goals of the program.
- Maintain proper client and program participant records, ensuring they contain current information and remain well-organized and categorized
- Conducts community outreach to inform prospective patients of behavioral health services available at BUIHWC.
- Assists in connecting prospective patients to BUIHWC patient registration to register for services.

- Interview potential clients and their family members, and use the information to compile a file related to their drug, social, financial, educational, and criminal background
- serve as an excellent source of support and guidance for individuals who are struggling to navigate independent living while managing a mental or physical disability, mental illness, or other challenges
- Follow-up on appointments, community activities, and forms to ensure they're properly completed
- Completes NOM's service tool questionnaire with participants at required intervals.
- Reviews NOM's documentation for deficiencies and completeness ensuring readiness for abstracting data entry and completing patient demographic information.
- Assists in scheduling and coordinating services in the community as needed.
- Familiar with community resources available to Native Americans in Yellowstone County.
- Provides outreach and case management to connect participants with social services in the community (i.e. workforce development center, housing services, homeless shelters, domestic violence shelters, food assistance, etc.).
- Implements goals and objectives with the Project Director.
- Works with community partners to support mutual efforts and successfully accomplish project objectives.
- Performs general office functions i.e. answering phones, email, correspondence, greeting participants, scheduling, cancellations, etc.
- Local travel as required to fulfill project roles and responsibilities.
- Participate in staff meetings, prevention meetings, and training as required or needed.
- Prepare quarterly and annual reports as required by Project Director.
- Attend and represent BUIHWC at required meetings and other meetings as assigned.
- Perform other duties as assigned in order to meet BUIHWC's mission and the goals and objectives of COVID-19 ERSP Project.
- Follow up on referrals sent through community partners within 24-48 hours.
- Community support specialists may provide vital support services during a mental health crisis by contacting family members, notifying law enforcement, and contacting the client's psychiatrist for hospital placement.

**Minimum Qualifications (Experience/Education):**

- Bachelor's degree in Public Health, Behavioral Health, or two years' experience in case management.
- Experience providing case management services and community outreach in Yellowstone County, Montana.
- Experience with crisis intervention and triage preferred.
- Demonstrated ability to work collaboratively with others in order to achieve meaningful results.
- Ability to present ideas, transmit information, and/or convey concepts to individuals or groups of people of varying educational, cultural, and experiential levels.
- Experience administering survey questionnaires and data entry.
- Education, experience, or knowledge in suicide prevention and early intervention.



- Knowledge of HIPAA, patient confidentiality, and mandatory reporting requirements.
- Experience documenting in the electronic health record and telehealth applications.
- COVID-19 Vaccination

**Competencies or Knowledge, Skills and Abilities (KSA's):**

- Knowledge of 12 federally recognized tribes in Montana and the local Native American population through work experience, academic background, and/or training.
- Knowledge of how to provide services that are culturally appropriate.
- Knowledge of best practices in suicide treatment and prevention.
- Knowledge of public mental health and related human services fields.
- Experience in working with evidence-based practice models and approaches.
- Use effective communication with diverse audiences in groups and individually by employing active listening and the use of clear, concise verbal and written communication that is accurate, timely, and courteous.
- Complete CPR and first aid training.

**Physical Demands & Working Conditions:**

- Position is expected to interact in-person and virtually with adults 25 years old in physical activities, such as hiking, walking, bending, stooping, kneeling, squatting, crouching, balancing reaching overhead, pulling, pushing, talking, hearing/listening, and climbing stairs.
- Frequently sitting, with continuous full use of hands in repetitive hand motion, such as typing.
- Clear vision, as well as speak and hearing with normal conversations.
- Requires high attention to detail with frequent deadlines and internal and external social interaction.
- Regular lifting, moving, and carrying items 5-30 pounds. Occasionally lifting items up to 75 pounds.
- Work is primarily in an office environment. Must be able to work within an office/clinic/at-home setting, with the flexibility to change settings as needed.
- Occasional outdoor environment for physical activities described above.
- Occasionally exposed to on-street driving and moving vehicles with overnight stays away from home.
- Work hours are generally Monday through Friday, 8AM-5PM, but will include early morning, evenings and weekend events.

**NADC-BUIHWC** is an Equal Opportunity Employer. **NADC-BUIHWC** does not discriminate on the basis of race, religion, color, sex, gender identity, sexual orientation, age, non-disqualifying physical or mental disability, national origin, veteran status or any other basis covered by appropriate law. All employment is decided on the basis of qualifications, merit, and business need.

*The above statements are intended to describe the general nature and level of work being performed by the individual assigned this position. This job description is not intended to be an exhaustive list of all responsibilities, duties and skills of the personnel in those positions(s).*

*I have read and accept the duties and responsibilities as outlined. I have also been given the opportunity to discuss any questions or concerns regarding any or all of the above directly with my supervisor prior to signing this document. Further, I agree to notify my supervisor immediately in the event that I am unable to fulfill any or all of the duties as outlined above.*

*I understand that **NADC-BUIHWC** reserves the right to revise or change this job description as the need arises.*

*I have reviewed this job description and received a copy.*

Employee Signature: \_\_\_\_\_/Date:

\_\_\_\_\_

Supervisor Signature: \_\_\_\_\_/Date:

\_\_\_\_\_



# D'Anthony Willis

## Work History

### **Grounded For Lyfe 501c-3** - Program Administrator

05/2020 through 06/2022

- Administrative duties including but not limited to:
- Marketing Public Relations, Social Media Management, Role Delegations, Event Planning, and Community Coordination

### **Joys Haven Recovery Home** - Recovery Coordinator

11/2020 – 06/2022

- Assisted in the opening, daily functioning, and advocating for the continued success of men in the homes focusing on reunification with their children

### **Rimrock Foundation**-Care Coordinator/Case Manager

04/2022 - Current

- Completed admission, transition, and discharge planning for clients receiving inpatient and residential care
- Collaborated with physicians, nurse leaders, and therapists on the clinical management of clients
- Aided clients with identifying resources, acquiring SS and Medicaid benefits, securing housing, and document processing

### **Rimrock Foundation** – Rehabilitation Technician, PACT Paraprofessional

Billings, MT

05/2021 – 04/2022

- Maintained healthy relationships, advocating for the members to ensure needs are met.
- Provides care to patients in a manner that promotes safety, comfort, and the therapeutic environment.
- Assists patients with activities of daily living; attends to patient behavioral problems and aids in crisis intervention, as needed.
- Participates in the development and implementation of patient treatment programs.
- Maintains confidentiality of patient records.



## Education

**Yellowstone Christian College** –  
pursuing a bachelor's in psychology  
2019-2021

Billings, MT

**Walden University** - Pursuing a  
bachelor's in Social Work

Currently enrolled

Columbia, MD

## Certifications

- Master Life Coach,  
Transformation Academy
- Transformation Life Coach,  
Transformation Academy
- Peer Coach Basic Training,  
MT Peer Network
- Mental Health First Aid
- CPR Heart saver

## Trainings

- De-Escalation
- Motivational Training
- Workplace Communication
- Suicide prevention
- Narcan Training
- Trauma – Informed Care

- Transports patients to and from appointments, clinics, laboratories, and/or treatments, as and when appropriate.
- Performed crisis de-escalation and stabilization for high-needs clients

### **BrandSafway - Scaffold Foreman**

Billings, MT

12/2018 - 03/2020

- Ran a crew and build scaffolding around the Exxon refinery.
- Planned each job with appropriate safety measures, addressing weight limits and fall protection
- Inspected all scaffold erections for condition and compliance with standards
- Managed team of 3 employees erecting scaffolds up to 120 feet
- Disassembled scaffolding and equipment when projects were completed or after each shift according to strict schedules
- Calculated materials and labor required to complete jobs on schedule and prepared estimates

### **Randash Auto - Car Salesman**

Billings, MT

01/2017 - 11/2018

- Lead Car Salesman. Sold over 300 cars in one year. Cold calling and off the lot.
- Negotiated purchase prices and explained sales, warranty, and optional products
- Drove team revenue totals by bringing in top sales numbers

### **BrandSafway - Scaffold Builder**

Billings, MT

01/2014 - 12/2016

Scaffold and Laborer Foreman for Exxon Refinery

- Disassembled scaffolding and equipment when projects were completed or after each shift according to strict schedules
- Carefully read blueprints, sketches, and technical drawings to inform comprehensive understanding of project scope and specifications
- Completed all tasks according to technical document requirements and specifications to work with accuracy
- Assembled durable, high-quality structures by working with forming systems, hand tools, and a range of equipment
- Safely operated electric cordless and hammer drills and cutting torches
- Followed protocols and stayed organized to provide personal and teammate safety

### **Avitus Group Lockwood Exxon – Assistant Manager**

Lockwood, MT

09/2011 – 10/2013

- Assess the strengths and weaknesses of the sales team and manage the sales program accordingly

- Complete store operational requirements by scheduling and assigning employees; following up on work results
- Maintain store staff by recruiting, selecting, orienting, and training employees
- Maintain store staff job results by coaching, counseling, and disciplining employees, planning, monitoring, and appraising job results
- Ensure availability of merchandise and services by approving contracts, maintaining inventories
- Protect employees and customers by providing a safe and clean store environment
- Maintain the stability and reputation of the store by complying with legal requirements



Report of Independent Auditors  
and Financial Statements for

**Native American Development  
Corporation**

September 30, 2022

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**SUBMITTED BY**



**McKenzie FORENSIC AUDITORS, INC.**

NATHANIEL MCKENZIE

2900 N 26TH AVE STE 211

FORT LAUDERDALE, FL 33301

PHONE: (786) 231-6694

FAX: (954) 251-0030

EMAIL:

[NATHAN@MCKENZIECPAGROUP.COM](mailto:NATHAN@MCKENZIECPAGROUP.COM)

[HTTP://WWW.MCKENZIEFORENSIC.COM/](http://WWW.MCKENZIEFORENSIC.COM/)

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## INDEPENDENT AUDITOR'S REPORT

To the Board of Directors and Management of  
Native American Development Corporation

### ***Opinion***

We have audited the financial statements of Native American Development Corporation, which comprise the Balance Sheet for year ended September 30, 2022 and the related statements of activities and cash flows for the years then ended and the related notes to the financial statements.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position Native American Development Corporation as of September 30, 2022 and 2021, and the results of its operations and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

### ***Basis for Opinion***

We conducted our audits in accordance with auditing standards generally accepted in the United States of America (GAAS). Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of Native American Development Corporation and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### ***Management's Responsibility for the Financial Statements***

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about Native American Development Corporation ability to continue as a going concern for financial year 2023.

### ***Auditor's Responsibility***

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of Native American Development Corporation internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about Native American Development Corporation ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.



McKenzie Forensic Group, Inc.  
Firm Audit License #: **AD67362**  
Individual License #: **AC44080**

Principal: Nathaniel McKenzie, MBA, CPA, CVA, CFE, CAM

Fort Lauderdale  
May 10, 2023

**NATIVE AMERICAN DEVELOPMENT CORPORATION**  
**CONSOLIDATED STATEMENT OF FINANCIAL POSITION**  
**AS OF SEPTEMBER 30, 2022**

ASSETS	\$
<b>CURRENT ASSETS</b>	
Cash and Cash Equivalents	4,395,908
Accounts Receivable	133,551
Related Party Receivables	-
Grants Receivable	994,295
Contracts Receivables	115,425
Notes Receivables - Current Portion	187,168
Prepaid expenses	16,669
TOTAL CURRENT ASSETS	<u>5,843,017</u>
<b>PROPERTY AND EQUIPMENT</b>	
Buildings and Improvement	1,161,683
Equipment	249,613
Furniture and vehicles	52,135
Leasehold improvements	87,802
Construction in Progress	-
Less : Accumulated Depreciation	<u>(334,352)</u>
TOTAL PROPERTY AND EQUIPMENT	<u>1,216,880</u>
<b>OTHER ASSETS</b>	
Other	2,150
Notes Receivable, Net of Current Portion and Allowance	<u>689,163</u>
TOTAL OTHER ASSETS	<u>691,313</u>
<b>TOTAL ASSETS</b>	<u><b>7,751,210</b></u>
<b>LIABILITIES AND NET ASSETS</b>	
<b>CURRENT LIABILITIES</b>	
Accounts Payable	329,229
Accrued Expenses	388,307
Deferred Revenue	4,628,313
Line of Credit	100,000
Note Payable - Current Portion	-
Long Term Debt - Current Portion	<u>252,498</u>
TOTAL CURRENT LIABILITIES	<u>5,698,347</u>
<b>OTHER LIABILITIES</b>	
Long Term Debt - Net of Current Portion	<u>796,647</u>
TOTAL OTHER LIABILITIES	<u>796,647</u>
TOTAL LIABILITIES	<u><b>6,494,993</b></u>
<b>NET ASSETS</b>	
Without Donor Restrictions	(6,702,120)
With Donor Restrictions	<u>7,958,336</u>
TOTAL NET ASSETS	<u>1,256,216</u>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<u><b>7,751,210</b></u>

See accompanying notes.

**NATIVE AMERICAN DEVELOPMENT CORPORATION**  
**CONSOLIDATED STATEMENT OF ACTIVITIES**  
**FOR THE YEAR ENDED SEPTEMBER 30, 2022**

	<b>Without Donor Restriction</b>	<b>With Donor Restriction</b>	<b>Total</b>
<b>OPERATING REVENUE AND SUPPORT</b>			
Grant Revenue	2,362	5,236,518	5,238,880
Private Grant Revenue	15,958	131,804	147,762
In-kind contributions	-	60,200	60,200
Consulting and contract Fees	399,565	909,341	1,308,906
Rental Income	67,079	-	67,079
Loan Fee and Interest Revenue	27,484	4,001	31,485
Other Revenues	1,120,381	72,595	1,192,976
Released from restrictions	6,387,933	(6,387,933)	-
 Total operating revenue and Support	 8,020,762	 26,526	 8,047,288
<b>EXPENSES</b>			
Management and General	1,390,231	-	1,390,231
Program services	6,780,108	-	6,780,108
Total expenses	8,170,339	-	8,170,339
 <b>CHANGE IN NET ASSETS</b>	 (149,577)	 26,526	 (123,051)
 Net Assets, Beginning of Year	 (164,610)	 1,543,877	 1,379,267
 <b>NET ASSETS, END OF YEAR</b>	 (314,187)	 1,570,403	 1,256,216

See accompanying notes.

**NATIVE AMERICAN DEVELOPMENT CORPORATION**  
**CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES**  
**FOR THE YEARS ENDED SEPTEMBER 30, 2022**

	<b>Management and General</b>	<b>Program Services</b>	<b>Total</b>
Accounting Fees	53,739.75	21,487.95	75,227.70
Advertising	9,615.85	49,476.94	59,092.79
Bad Debt Expense	10,163.20	-	10,163.20
Contributions	966.11	144.90	1,111.01
Depreciation	65,210.63	-	65,210.63
Dues and subscriptions	9,535.09	26,613.31	36,148.40
Educational	3,492.68	43,774.75	47,267.43
Employee benefits	105,310.97	240,886.91	346,197.88
Equipment costs	5,185.42	4,343.57	9,528.99
Fees	1,957.82	42.00	1,999.82
In-Kind expenses	-	60,200.40	60,200.40
Insurance - Professional	5,409.00	25,564.95	30,973.95
Interest Expense	36,125.93	10,312.50	46,438.43
Janitorial Services	3,850.72	13,401.31	17,252.03
Legal Services	29,761.22	19,519.25	49,280.47
Medical Supplies	316.08	100,208.38	100,524.46
Miscellaneous expense	12,224.89	12,013.62	24,238.51
Meetings	64,768.57	10,782.95	75,551.52
Payroll Taxes	72,969.84	217,296.82	290,266.66
Postage and Shipping	815.35	1,234.32	2,049.67
Printing and Postage	4,283.88	15,453.27	19,737.15
Professional services	97,742.66	872,429.93	970,172.59
Rent, Parking, and Occupancy	35,503.00	201,572.38	237,075.38
Repairs and Maintenance	4,178.69	1,856.77	6,035.46
Salaries and wages	598,965.28	2,487,869.25	3,086,834.53
Security	2,076.72	1,002.25	3,078.97
Staff Development	56.00	38,873.15	38,929.15
Supplies	35,840.08	229,233.28	265,073.36
Taxes	11,424.72	-	11,424.72
Telephone and communications	12,461.63	59,507.93	71,969.56
Travel	45,443.96	149,725.15	195,169.11
Utilities	13,838.56	710.18	14,548.74
Vehicle Maintenance	494.20	3,861.90	4,356.10
Capital Outlay	-	421,735.04	421,735.04
Construction/ Improvements	-	119,620.79	119,620.79
Sub-Recipient Agreement	-	298,687.00	298,687.00
In Direct Cost	-	613,108.76	613,108.76
Legal Settlement	75,000.00	-	75,000.00
Cash Match Expenses	60,991.00	69,175.16	130,166.16
Lending Expenses	-	25,000.00	25,000.00
Transfer To/From Funds	1,653.84	-	1,653.84
Gains and Losses	-	12,500.00	12,500.00
Other Non-Cash Expenses	1,928.23	-	1,928.23
<b>TOTAL EXPENSES BY FUNCTION</b>	<b>1,493,301.57</b>	<b>6,479,227.02</b>	<b>7,972,528.59</b>

See accompanying notes.

**NATIVE AMERICAN DEVELOPMENT CORPORATION**  
**CONSOLIDATED STATEMENT OF CASH FLOWS**  
**FOR THE YEARS ENDED SEPTEMBER 30, 2022**

<b>CASH FLOW FROM OPERATING ACTIVITIES</b>	<b>NADC</b>	<b>AICS</b>	<b>Total</b>
Change in Net Assets	(103,856)	(43,273)	(147,129)
Adjustments to reconcile Change in Net Asset to Net Cash			
Flows provided by Operating Activities:			
Depreciation	65,211	-	65,211
(Increase)/Decrease in Assets:			
Accounts Receivable	(5,966)	16,665	10,698
Grants Receivable	(341,489)	-	(341,489)
Other Receivables	53,836	-	53,836
Prepaid expenses	(3,600)	-	(3,600)
Other Assets	95,523	-	95,523
Increase/(Decrease) in Liabilities:			
Accounts Payable	(25,332)	79,462	54,130
Accrued expenses	81,722	10,616	92,338
Deferred Revenue	505,472	-	505,472
<b>NET CASH PROVIDED BY OPERATING ACTIVITIES</b>	<b>321,520</b>	<b>63,470</b>	<b>384,989</b>
<b>CASH FLOW FROM INVESTING ACTIVITIES</b>			
Purchases of Property and Equipment	(178,532)	-	(178,532)
Purchases Received on Loans Receivable	(180,826)	-	(180,826)
<b>NET CASH USED IN INVESTING ACTIVITIES</b>	<b>(359,358)</b>	<b>-</b>	<b>(359,358)</b>
<b>CASH FLOW FROM FINANCING ACTIVITIES</b>			
Principal repayment of Debt	(196,900)	25,000	(171,900)
<b>NET CASH USED IN FINANCING ACTIVITIES</b>	<b>(196,900)</b>	<b>25,000</b>	<b>(171,900)</b>
<b>NET CHANGE IN CASH AND CASH EQUIVALENTS</b>	<b>(234,738)</b>	<b>88,470</b>	<b>(146,268)</b>
<b>CASH AND CASH EQUIVALENTS BEGINNING OF YEAR</b>	<b>4,461,382</b>	<b>70,631</b>	<b>4,532,013</b>
<b>CASH AND CASH EQUIVALENTS END OF YEAR</b>	<b>4,226,644</b>	<b>159,101</b>	<b>4,385,745</b>


See accompanying notes.

**NATIVE AMERICAN DEVELOPMENT CORPORATION**  
**CONSOLIDATING STATEMENT OF FINANCIAL POSITION**  
**FOR THE YEARS ENDED SEPTEMBER 30, 2022**

ASSETS	NADC	AICS	ELIMINATION	TOTAL
<b>CURRENT ASSETS</b>				
Cash and Cash Equivalents	4,236,807	159,101	-	4,395,908
Accounts Receivable	20,359	113,193	-	133,551
Related Party Receivables	31,040	-	(31,040)	-
Grants Receivable	994,295	-	-	994,295
Contracts Receivables	115,425	-	-	115,425
Notes Receivables - Current Portion	187,168	-	-	187,168
Prepaid expenses	16,669	-	-	16,669
<b>TOTAL CURRENT ASSETS</b>	<b>5,601,764</b>	<b>272,293</b>	<b>(31,040)</b>	<b>5,843,017</b>
<b>PROPERTY AND EQUIPMENT</b>				
Buildings	949,008	-	-	949,008
Equipment	156,927	92,686	-	249,613
Furniture and vehicles	52,135	-	-	52,135
Improvements	212,674	-	-	212,674
Leasehold improvements	87,802	-	-	87,802
Less : Accumulated Depreciation	(241,666)	(92,686)	-	(334,352)
<b>TOTAL PROPERTY AND EQUIPMENT</b>	<b>1,216,880</b>	<b>-</b>	<b>-</b>	<b>1,216,880</b>
<b>OTHER ASSETS</b>				
Investment in AICS	(97,340)	-	97,340	-
Other	2,150	-	-	2,150
Notes Receivable, Net of Current Portion and Allowance	751,866	-	(62,703)	689,163
<b>TOTAL OTHER ASSETS</b>	<b>656,675</b>	<b>-</b>	<b>34,637</b>	<b>691,313</b>
<b>TOTAL ASSETS</b>	<b>7,475,320</b>	<b>272,293</b>	<b>3,597</b>	<b>7,751,210</b>
<b>LIABILITIES AND NET ASSETS</b>				
<b>CURRENT LIABILITIES</b>				
Accounts Payable	263,537	65,692	-	329,229
Accrued Expenses	374,602	13,705	-	388,307
Deferred Revenue	4,628,313	-	-	4,628,313
Line of Credit	100,000	-	-	100,000
Related Party Note Payable - Current Portion	-	31,040	(31,040)	-
Long Term Debt - Current Portion	252,498	62,703	(62,703)	252,498
<b>TOTAL CURRENT LIABILITIES</b>	<b>5,618,949</b>	<b>173,141</b>	<b>(93,743)</b>	<b>5,698,347</b>
<b>OTHER LIABILITIES</b>				
Related Party Note Payable - Net of Current Portion	-	-	-	-
Long Term Debt - Net of Current Portion	796,647	-	-	796,647
<b>TOTAL OTHER LIABILITIES</b>	<b>796,647</b>	<b>-</b>	<b>-</b>	<b>796,647</b>
<b>TOTAL LIABILITIES</b>	<b>6,415,596</b>	<b>173,141</b>	<b>(93,743)</b>	<b>6,494,993</b>
<b>NET ASSETS</b>				
With Donor Restrictions	1,381,510	-	-	1,381,510
Without Donor Restrictions	(321,786)	99,153	97,340	(125,293)
<b>TOTAL NET ASSETS</b>	<b>1,059,723</b>	<b>99,153</b>	<b>97,340</b>	<b>1,256,216</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>7,475,320</b>	<b>272,293</b>	<b>3,597</b>	<b>7,751,210</b>

See accompanying notes.

**NATIVE AMERICAN DEVELOPMENT CORPORATION**  
**CONSOLIDATING STATEMENT OF ACTIVITIES**  
**FOR THE YEARS ENDED SEPTEMBER 30, 2022**

	Without Donor Restriction	With Donor Restriction	Total	AICS	Elimination	Total
<b>OPERATING REVENUE AND SUPPORT</b>						
Grant Revenue	2,362	5,236,518	5,238,880	-	-	5,238,880
Private Grant Revenue	15,958	131,804	147,762	-	-	147,762
In-kind contributions	-	60,200	60,200	-	-	60,200
Consulting and contract Fees	220,949	909,341	1,130,290	281,686	(103,070)	1,308,906
Rental Income	67,079	-	67,079	-	-	67,079
Loan Fee and Interest Revenue	27,484	4,001	31,485	-	-	31,485
Other Revenues	1,120,381	72,595	1,192,976	-	-	1,192,976
Released from restrictions	6,387,933	(6,387,933)	-	-	-	-
Total operating revenue and Support	7,842,146	26,526	7,868,672	281,686	(103,070)	8,047,288
<b>EXPENSES</b>						
Management and General	1,493,302	-	1,493,302	-	(103,070)	1,390,231
Program services		6,479,227	6,479,227	300,881		6,780,108
Total expenses	1,493,302	6,479,227	7,972,529	300,881	(103,070)	8,170,339
<b>CHANGE IN NET ASSETS</b>	6,348,844	(6,452,701)	(103,856)	(19,194) 	-	(123,051)
Net Assets, Beginning of Year	(380,297)	1,543,877	1,163,580	118,347	97,340	1,379,267
<b>NET ASSETS, END OF YEAR</b>	<u>5,968,547</u>	<u>(4,908,824)</u>	<u>1,059,724</u>	<u>99,153</u>	<u>97,340</u>	<u>1,256,216</u>

See accompanying notes.



**NATIVE AMERICAN DEVELOPMENT CORPORATION  
SCHEDULE OF FEDERAL EXPENDITURE  
FOR THE YEARS ENDED SEPTEMBER 30, 2022**

<b>Federal Grantor/Pass-through Grantor/Program</b>	<b>CFDA #</b>	<b>Award Period</b>	<b>Grant #</b>	<b>Total Federal Expenditures</b>
<b><u>U.S. DEPARTMENT OF DEFENSE</u></b>				
Direct Funding:				
Procurement Technical Assistance for Business Firms	12.002	10/01/2021-09/30/2022	SP4800-21-2-2198	605,425.00
<b>Total U.S. Department of Defense</b>				<b>605,425.00</b>
<b><u>U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES</u></b>				
Direct Funding:				
Substance Abuse and Mental Health Services Administration				
Standing Buffalo Strong - Year 3 of 5	93.243	6/30/2021 to 6/29/2022	1H79SM082169-01	506,329.67
Standing Buffalo Strong - Year 4 of 5	93.243	6/30/2022 to 6/29/2023	1H79SM082169-01	128,984.41
Billings Native Connections Yr2	93.243	07/31/2021-07/30/2022	1H79SM082707-01	181,380.86
Billings Native Connections Yr3	93.243	07/31/2022-07/30/2023	1H79SM082707-01	46,353.58
16 Mo Emergency Response	93.665	08/15/2021-9/30/2023	6H79FG000535-01MOC	297,550.60
Urban Indian Health & Wellness- 4 in 1_Year 4		04/01/2021-03/31/2022	H722IHS0247-01-01	227,158.80
Urban Indian Health & Wellness- 4 in 1_Year 1		04/01/2022-03/31/2023	H722IHS0247D-01-01	103,459.09
Opioid Pilot Project- Year 1	93.933	04/1/2021-03/31/2022	H1H5IHS0032-01-00	81,908.89
Opioid Pilot Project- Year 2	93.933	04/1/2022-03/31/2023	H1H5IHS0032-01-00	342,753.31
<b>Office of Minority Health</b>				
Demonstration Sites Year 1	93.137	09/30/2021-09/29/2022	1 CPIMP211313-01-00	329,756.86
Demonstration Sites Year 2	93.137	09/30/2022-09/29/2023	1 CPIMP211313-01-00	6,541.85
<b>Total U.S. Department of Health and Human Services</b>				<b>2,252,177.92</b>
<b><u>U.S. DEPARTMENT OF AGRICULTURE</u></b>				
Direct Funding:				
USDA Legal Summit	10.351	6/28/2019-9/30/2022	RBDG	5,000.00
<b>Total U.S. Department of Agriculture</b>				<b>5,000.00</b>
<b><u>U.S. DEPARTMENT OF TREASURY</u></b>				
Direct Funding:				
Rapid Response Program Yr1	21.024	06/15/2021 to 09/30/2022	21RRP057549	151,917.52
<b>Total U.S. Department of the Treasury</b>				<b>151,917.52</b>
<b><u>U.S. SMALL BUSINESS ADMINISTRATION</u></b>				
Direct Funding:				
7J Management and Technical Services Yr2	59.007	10/01/2020 to 9/30/2021	SBAOEDNA200007-01	3,847.77
<b>Total U.S. Small Business Administration</b>				<b>3,847.77</b>
<b><u>U.S. Department of Commerce</u></b>				
MBDA E-Commerce Phase II Yr1	11.804	09/01/2021 to 08/31/2022	MB21OBD8040244	149,602.33
MBDA E-Commerce Phase II Yr2	11.804	09/01/2022 to 08/31/2023	MB21OBD8040244	21,634.63
EDA Build Back Better-FBCF	11.307			-
<b>Total U.S. Department of Commerce</b>				<b>171,236.96</b>
<b>Total Federal Funding</b>				<b>3,189,605.17</b>

See accompanying notes.

**NATIVE AMERICAN DEVELOPMENT CORPORATION  
NOTES TO ACCOUNTS  
FOR THE YEARS ENDED SEPTEMBER 30, 2022**

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**Note 1 – Description of the Organization**

The Native American Development Corporation (NADC) is a nonprofit organization established in 1996 and located in Billings, Montana. In 2001, NADC became a certified Native Community Development Finance Institution (CDFI) and in 2009, launched a Native Procurement Technical Assistance Center (PTAC) to assist entrepreneurs in navigating government contracting opportunities. Late in 2018, the Organization opened the Billings Urban Indian Health and Wellness Center (BUIHWC) to serve the American Indian population living in Billings and Yellowstone County through a range of culturally appropriate medical services.

NADC has historically and consistently remained an organization that works to create, stimulate, and advocate for Native American people and societies. The Organization was founded on the basic premise of "combating community deterioration, poverty, unemployment, racial discrimination and prejudice; to reduce neighborhood tensions; to relieve the poor, distressed and underprivileged within poverty-stricken Indian reservations" by providing programs and resources that seek to alleviate the underlying issues related to generational poverty in Indian Country.

Our mission is to be a high-quality, high-performing, sustainable community and economic development corporation providing the tools and resources necessary for individuals and families, businesses and communities in rural reservation and urban Native areas in Montana, Wyoming, North Dakota, and South Dakota to not just survive, but to thrive. We view this as a long-term commitment and continue to make progress towards this end by leveraging existing and new human and financial resources.

The Organization serves entrepreneurs, individuals, families, and regions working towards self-sufficiency, economic and social stability through core activity areas of: Technical Assistance; Business Lending; Health and Wellness; and Entrepreneurial Advocacy and Support. Our work is driven by a desire to provide a "hand up" and not a "hand out".

In 2011, the Organization created American Indian Consulting Services, Inc. (AICS), a for-profit subsidiary, which works closely with the Organization to provide services to Native American entrepreneurs. AICS is a wholly owned subsidiary, and the results of its financial operations are included in this consolidated report.

**Note 2 – Summary of Significant Accounting Policies**

**Basis of presentation** –The consolidated financial statements of Native American Development Corporation have been prepared in accordance with U.S. generally accepted accounting principles ("US GAAP"), which require Native American Development Corporation to report information regarding its financial position and activities according to the following net asset classifications:

**Net assets without donor restrictions:** Net assets that are not subject to donor-imposed restrictions and may be expended for any purpose in performing the primary objectives of the organization. These net assets may be used at the discretion of Native American Development Corporation's management and the board of directors.

**Net assets with donor restrictions:** Net assets subject to stipulations imposed by donors, and grantors. Some donor restrictions are temporary in nature; those restrictions will be met by actions of Native American Development Corporation or by the passage of time. Other donor restrictions are perpetual in nature, where by the donor has stipulated the funds be maintained in perpetuity.

Donor restricted contributions are reported as increases in net assets with donor restrictions. When a restriction expires, net assets are reclassified from net assets with donor restrictions to net assets without donor restrictions in the statements of activities.

**Consolidated Financial statements** – The consolidated financial statements include the accounts of Native American Development Corporation and American Indian Consulting Services. The entities are consolidated since Native American Development Corporation has both an economic interest in and control of American Indian Consulting Services through a majority voting interest in their governing board. The Native American Development Corporation also provides administrative services for American Indian Consulting Services. All significant interorganizational transactions have been eliminated.

**Measure of operations** – The statements of activities reports all changes in net assets, including changes in net assets from operating and nonoperating activities. Operating activities consist of those items attributable to Native American Development Corporation's ongoing services and interest and dividends earned on investments. Nonoperating activities are limited to resources that generate return from investments and other activities considered to be of a more unusual or nonrecurring nature.

**Cash and cash equivalents** – Native American Development Corporation's cash consists of cash on deposit with banks. Cash equivalents represent money market funds or short-term investments with original maturities of three months or less from the date of purchase, except for those amounts that are held in the investment portfolio which are invested for long-term purposes.

**Concentrations of credit risk** – Financial instruments that potentially subject Native American Development Corporation to concentrations of credit risk consist principally of cash and cash equivalents and investments. Native American Development Corporation maintains its cash and cash equivalents in various bank accounts that, at times, may exceed federally insured limits. Native American Development Corporation's cash and cash equivalent accounts have been placed with high credit quality financial institutions. Native American Development Corporation has not experienced, nor does it anticipate, any losses with respect to such accounts.

**Grants receivable** - The Organization is the recipient of various grant awards, some of which are of a cost reimbursement type and others are advance-funded. Revenue is recognized when the specified costs described in the grant agreements are incurred. Grants receivable represent amounts due from the various federal and nonfederal granting agencies for reimbursement of expenses for various programs. Management has determined that the receivables are fully collectible; therefore, no allowance for uncollectable accounts is considered necessary as of September 30, 2022. Amounts collected in advance of incurring specified costs are reflected as deferred revenues.

**Due to/from related parties** – In February 2015, NADC signed a note with American Indian Consulting Services, Inc. (AICS), a wholly owned subsidiary, whereby NADC agreed to loan AICS up to \$100,000, with the proceeds to be used for start-up expenses. The note calls for interest to accrue monthly at an annual rate of 7.0%. The note was amended in May 2015 and July 2015, with a maturity date of November 15, 2024. The revised terms of the note require monthly principal and interest payments of \$1,101.40, some outstanding back payments of which were added to the loan balance. The interest rate remained unchanged. As of September 30, 2022, the outstanding balance on this note was \$79,329.60. The balance of this note has been eliminated on the consolidated statement of financial position. The amount in the Balance Sheet does not match the \$79,329.60 as the loan was reissued in January 2023, and is a carryover from prior years of non-payment.

In August 2015, the Organization agreed to lend \$295,546.30 to Northern Arapaho Tribal Industries (NATI), a wholly owned enterprise of the Northern Arapaho Tribe, for the purpose of installing fiber optic cable within the Wind River Indian Reservation. The note states payments are due monthly in the amount of \$2,260.68 and the note accrues interest at a rate of 7.0% with a maturity date in 2030. The chairman of NATI's board of directors is also a member of NADC's board of directors. As of September 30, 2022, the outstanding balance on this loan was \$291,370.30.

**Property and equipment, net** – Property and equipment are stated at cost at the date of purchase or, for donated assets, at fair value at the date of donation, less accumulated depreciation. Depreciation is calculated using the straight-line method over the lesser of the estimated useful lives of the assets or the lease term. The useful lives range from three to thirty-nine years. Native American Development Corporation's policy is to capitalize renewals and betterments acquired for greater than \$5,000 and expense normal repairs and maintenance as incurred. Native American Development Corporation's management periodically evaluates whether events or circumstances have occurred indicating that the carrying amount of long-lived assets may not be recovered.

The Organization reports gifts of property and equipment as unrestricted support unless explicit donor stipulations specify how the donated assets must be used. Gifts of long-lived assets with explicit restrictions that specify how the assets are to be used and gifts of cash and other assets that must be used to acquire long-lived assets are reported as restricted support. Absent explicit donor stipulations about how long those long-lived assets must be maintained, the Organization reports expirations of donor restrictions when the donated or acquired long-lived assets are placed in service.

**Contributions** – Contributions received are recorded as net assets without donor restrictions or net assets with donor restrictions, depending on the existence and/or nature of any donor-imposed restrictions. Contributions that are restricted by the donor are reported as an increase in net assets without donor restrictions if the restriction expires in the reporting period in which the contribution is recognized. All other donor restricted contributions are reported as an increase in net assets with donor restrictions, depending on the nature of restriction. When a restriction expires (that is, when a stipulated time restriction ends or purpose restriction is accomplished), net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statements of activities as net assets released from restrictions.

Contributed property and equipment are recorded at fair value at the date of donation. Contributions with donor-imposed stipulations regarding how long the contributed assets must be used are recorded as net assets with donor restrictions; otherwise, the contributions are recorded as net assets without donor restrictions.

**Grant Revenue** – The Organization’s grant awards are contributions which are evaluated for conditions and recognized as revenue when conditions in the award are satisfied. Unconditional awards are recognized as revenue when the award is received. Amounts received in which conditions have not been met are reported as a deferred revenue.

**In-kind donations** – Native American Development Corporation received donated professional services of \$19,520 for the year ended September 30, 2022. Such amounts, which are based upon information provided by third-party service providers, are recorded at their estimated fair value determined on the date of contribution and are reported as contributions in-kind and supporting services on the accompanying statements of activities and statements of functional expenses.

**Functional expenses** – The costs of providing program and other activities have been summarized on a functional basis in the statements of activities. Accordingly, certain costs have been allocated among program and related services benefited. Such allocations are determined by management on an equitable basis. Accordingly, salaries and related benefits have been allocated based on estimated time spent in program and supporting services. Other shared costs such as depreciation and occupancy expenses are allocated based on square footage occupied by program services.

**Use of estimates** – The preparation of financial statements in conformity with US GAAP requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Actual results could differ from those estimates.

**Income taxes** –Native American Development Corporation is exempt from income tax under IRC section 501(c)(3), though it is subject to tax on income unrelated to its exempt purpose, unless that income is otherwise excluded by the Code. Native American Development Corporation has processes presently in place to ensure the maintenance of its tax-exempt status; to identify and report unrelated income; to determine its filing and tax obligations in jurisdictions for which it has nexus; and to identify and evaluate other matters that may be considered tax positions. Native American Development Corporation has determined that there are no material uncertain tax positions that require recognition or disclosure in the financial statements.

AICS is organized as a C corporation and is subject to taxation at the federal and state level. AICS applies generally accepted accounting principles for recognition of uncertainty in income taxes and prescribing a recognition threshold and measurement attribute for the recognition and measurement of a tax position taken or expected to be taken in a tax return.

In the course of its assessment, AICS has determined that it is subject to examination of their income tax filings in the United States and state jurisdictions for the three previous tax years. In the event that AICS is assessed penalties and or interest, these amounts will be charged to expense in the period when assessed.

### **Note 3 – Availability and Liquidity**

The following represents Native American Development Corporation’s financial assets at September 30, 2022 and 2021:

#### **LIQUIDITY AND AVAILABILITY**

Cash and Cash Equivalents	4,395,908
Accounts Receivable	133,551
Less : Net Assets without Donor Restriction Deficit	(314,187)
Less : Net Assets with Donor Restriction	1,570,403
<b>TOTAL</b>	<b>5,785,676</b>

Native American Development Corporation's goal is generally to maintain financial assets to meet operating expenses. Native American Development Corporation has a \$100,000 line of credit available to meet cash flow needs.

The Organization maintains a line of credit with First Interstate Bank in the amount of \$50,000 with interest at 8.00%. The outstanding balance at September 30, 2022, was \$50,000. The line of credit is partially collateralized by a savings account.

The Organization maintains a second line of credit with Wells Fargo of \$50,000 with interest at 11.75%. The line of credit is not collateralized. As of September 30, 2022, the outstanding balance was \$50,000.

#### **Note 4 – Property and Equipment, Net**

Property and equipment, net consisted of the following at September 31, 2022:

	<b>Sep 30,2021</b>	<b>Additions</b>	<b>Deduction</b>	<b>Sep 30,2022</b>
Property and equipments:				
Buildings and Improvements	1,042,062	119,621		1,161,683
Leasehold improvements	87,802			87,802
Equipment	190,702	58,911		249,613
Furniture and Vehicles	52,135			52,135
Construction in progress	57,500		57,500	-
Subtotal	1,430,201	178,531	57,500	1,551,232
Less : Accumulated Depreciation for				
Buildings & Improvement	90,996	34,703	-	125,699
Leasehold improvements	14,141	5,854	-	19,995
Equipment	58,803	18,138	-	76,941
Furniture and Vehicles	105,203	6,517	-	111,720
	269,143	65,211	-	334,354
<b>TOTAL</b>	<b>\$ 1,161,058.00</b>			<b>\$ 1,216,878.53</b>

Note: There is a historical correction in asset categorization of \$15,890, from Building & Improvement to Leasehold Improvement.

For the years ended September 30, 2021 and 2022, depreciation expense totaled \$53,681 and \$65,211, respectively.

#### **Note 5 – Note Receivable**

The Organization extends notes to various tribal organizations within its service area using grant monies, revolving loan funds, and other loan proceeds. As of September 30, 2022, the Organization has 11 Notes Receivable totaling \$724,913. Of these totals, approximately \$209,080 in principal will mature in the coming years. Interest rates range from 4% to 8%.

There were no impaired notes or notes on nonaccrual status as of September 30, 2022. However, the Organization routinely reviews their notes receivable and evaluates each note for repayment. As a result, they had an allowance for note losses of \$62,500 at September 30, 2022.

Long Term notes receivable consist of the following:

NADC Loan Portfolio	938,831
Less : Notes receivable - current portion	(187,168)
Less : Allowance for Loan Loss	(62,500)
Notes receivable - Long term Portion, Net of Allowance for Doubtful Accounts	<u>689,163</u>
Balance - Beginning of Year	62,500
Loans charged off	-
Bad debt expense	-
Balance - End of Year	<u>62,500</u>

The Organization considers loans impaired when, based on current information, it is probable that the Organization will not collect all amounts due in accordance with contractual terms of the loan agreement. This generally includes all loans over 180 days delinquent and other loans where management has received indications suggesting future nonperformance is likely. Loans that are deemed impaired are evaluated for impairment individually. Loans that are not impaired are evaluated for impairment collectively based on past loss experience, current economic risks and other relevant factors. During the year ended September 30, 2022, there were zero loans that were considered impaired and written off.

#### Note 6 – Lease Commitments

Effective June 1, 2018, the Organization entered into a five-year lease agreement to lease space in Billings on a per square foot basis. Total rent expense incurred under operating leases totaled \$237,075 and \$232,504 for the years ended September 31, 2022 and 2021 respectively.

For years subsequent to 2022, minimum annual future rental commitments under the lease agreements, are as follows:

##### OPERATING LEASE

##### Year ending September 30

2023

152,106.45

152,106.45

Deferred rent consists of the excess of the rental expenses on a straight-line basis over the payments required by the lease and is included in other liabilities in the statements of financial position. As of September 31, 2022 and 2021, the deferred rent liability balance was \$95,000 and \$96,000, respectively.

#### Note 7 –Net Assets

Net assets with donor restrictions were as follows for the years ended September 30, 2022 and 2021:

##### NET ASSETS WITH DONOR RESTRICTIONS

Northwest Area Foundation	300,000
MBDC (Restricted Amount)	40,800
CDFI Loan Program	<u>1,040,710</u>
Total	<u>1,381,510</u>

## Note 8 – Employee Benefit Plan

The Native American Development Corporation has a SIMPLE IRA defined contribution plan covering all employees. The assets are held for each employee in an individual account maintained by an investment firm. Native American Development Corporation's match is 3% of each qualified employee's basic contribution. Plan contribution before non-vesting forfeiture incurred by Native American Development Corporation during the years ended September 30, 2022 and 2021 totaled \$35,232 and \$26,068, respectively.

## Note 9 – Long Term Debt

Native American Development Corporation has the following notes payable as of September 30, 2022:

Note payable to First Montana Title Co.; used to purchase new building; interest rate of 5.0%; requires monthly principal and interest payments of \$3,800 which progressively increase with each passing year, and remaining outstanding balance due at maturity; matures March 2025.	1,049,145
Total long term Notes payable	<u>1,049,145</u>
Less : Current Portion	
Note Payable to Montana Department of Commerce, used to increase revolving micro-loan fund, interest rate of 2.2%, requires quarterly interest payments with balloon payment at maturity, matures June 2024; secured by revolving business micro loan depository account.	(240,000)
Others	(12,498)
Total long term Portion	<u><u>796,647</u></u>

## Long term debt maturities are as follows:

<u>Year ending September 30</u>	
2023	54,590
2024	56,773
2025	444,041
2026	668,729
	<u><u>1,224,133</u></u>

## Note 10 – Economic Dependency

The Organization received \$5,238,880 in grant revenues from the United States federal government and private sources during 2022 for various grants and contracts. If the grants were terminated, without obtaining funding from alternative sources, the decrease in revenue could impair the Organization's operations.

## Note 11 – Subsequent Events

Native American Development Corporation has evaluated subsequent events through May 10, 2023, which is the date the financial statements were available to be issued. Native American Development Corporation is not aware of any material subsequent events.



## **NOTES TO SCHDEULE OF FEDERAL EXPENDITURE**

### **NOTE 1 GENERAL**

The accompanying schedule of expenditures of federal awards (the Schedule) includes the federal grant activity of Native American Development Corporation under programs of the federal government for the year ended September 30, 2022. The information in this schedule is presented in accordance with requirements of the Title 2 U.S. Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance). Because the Schedule presents only a selected portion of the operations of Native American Development Corporation, it is not intended to, and does not, present the financial position, changes in net assets, or cash flows of Native American Development Corporation.

### **NOTE 2 BASIS OF ACCOUNTING**

Expenditures reported on the Schedule are reported on the accrual basis of accounting. Such expenditures are recognized following the cost principles contained in the Uniform Guidance wherein certain types of expenditures are not allowable or are limited as to reimbursement. Pass-through entity identifying numbers are presented where available.

### **NOTE 3 INDIRECT COST RATE**

Native American Development Corporation has elected not to use the 10% de minimis indirect cost rate allowed under the Uniform Guidance. The Organization instead uses a provisional rate of 25.60% based on total direct costs less any capital expenditures.



**INDEPENDENT AUDITORS' REPORT ON INTERNAL CONTROL OVER  
FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS  
BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED  
IN ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS**

Board of Directors  
Native American Development Corporation  
Billings, Montana

We have audited, in accordance with auditing standards generally accepted in the United States and the standards applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller General of the United States, the consolidated financial statements of Native American Development Corporation (a nonprofit organization) and its subsidiary, which comprise the consolidated statement of financial position as of September 30, 2022, and the related consolidated statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the consolidated financial statements, and have issued our report thereon dated May 10, 2023. The consolidated financial statements of the subsidiary, American Indian Consulting Services, were not audited in accordance with Government Auditing Standards, and accordingly, this report does not include reporting on the internal controls over financial reporting or instances of reportable noncompliance associated with American Indian Consulting Services.

***Internal Control Over Financial Reporting***

In planning and performing our audit of the consolidated financial statements, we considered Native American Development Corporation's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the consolidated financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Native American Development Corporation's internal control. Accordingly, we do not express an opinion on the effectiveness of Native American Development Corporation's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A material weakness is a deficiency, or combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A significant deficiency is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified. We did identify certain deficiencies in internal control, described in the accompanying Schedule of Findings and Questioned Costs as item 2022-001 that we consider to be a material weakness.

***Compliance and Other Matters***

As part of obtaining reasonable assurance about whether Native American Development Corporation's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the consolidated financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion.

***Native American Development Corporation's Response to Findings***

Native American Development Corporation's response to the findings identified in our audit is described in the accompanying Management's Corrective Action Plan. Native American Development Corporation's response was not subjected to the auditing procedures applied in the audit of the consolidated financial statements and, accordingly, we express no opinion on it.

***Purpose of This Report***

The purpose of this report is solely to describe the scope of our testing of internal control and compliance, and the results of that testing, and not to provide an opinion on the effectiveness of Native American Development Corporation's internal control or on compliance. This report is an integral part of an audit performed in accordance with Government Auditing Standards in considering the Native American Development Corporation's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.



McKenzie Forensic Group, Inc.

Firm Audit License #: **AD67362**

Individual License #: **AC44080**

Principal: Nathaniel McKenzie, MBA, CPA, CVA, CFE, CAM

Fort Lauderdale

May 10, 2023



**INDEPENDENT AUDITORS' REPORT ON COMPLIANCE FOR EACH  
MAJOR FEDERAL PROGRAM AND ON INTERNAL CONTROL OVER  
COMPLIANCE REQUIRED BY THE UNIFORM GUIDANCE**

Board of Directors  
Native American Development Corporation  
Billings, Montana

***Report on Compliance for Each Major Federal Program***

We have audited Native American Development Corporation's compliance with the types of compliance requirements described in the OMB Compliance Supplement that could have a direct and material effect on each of its major federal programs for the year ended September 30, 2022. Native American Development Corporation's major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

***Management's Responsibility***

Management is responsible for compliance with federal statutes, regulations, and the terms and conditions of its federal awards applicable to its federal programs.

***Auditor's Responsibility***

Our responsibility is to express an opinion on compliance for each of Native American Development Corporation's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States; the standards applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance). Those standards and the Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about Native American Development Corporation's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination on Native American Development Corporation's compliance.

***Opinion on Each Major Federal Program***

In our opinion, Native American Development Corporation complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended September 30, 2022.

### ***Report on Internal Control Over Compliance***

Management of Native American Development Corporation is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered Native American Development Corporation's internal control over compliance with the types of requirements that could have a direct and material effect on a major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of Native American Development Corporation's internal control over compliance.

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent or detect and correct noncompliance with a type of compliance requirement of a federal program on a timely basis. A material weakness in internal control over compliance is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented or detected and corrected on a timely basis. A significant deficiency in internal control over compliance is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies and therefore material weaknesses or significant deficiencies may exist that have not been identified. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, we did identify a certain deficiency in internal control over compliance, described in the accompanying schedule of findings and questioned costs as item 2022-002, that we consider to be significant deficiencies.

Native American Development Corporation's response to the internal control over compliance finding identified in our audit is described in the accompanying schedule of findings and questioned costs. Native American Development Corporation's response was not subjected to the auditing procedures applied in the audit of compliance and, accordingly, we express no opinion on the response.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.



McKenzie Forensic Group, Inc.

Firm Audit License #: **AD67362**

Individual License #: **AC44080**

Principal: Nathaniel McKenzie, MBA, CPA, CVA, CFE, CAM

Fort Lauderdale

May 10, 2023

**NATIVE AMERICAN DEVELOPMENT CORPORATION  
SCHEDULE OF FINDINGS AND QUESTIONED COSTS  
YEAR ENDED SEPTEMBER 30, 2022**

**Section I – Summary of the Auditors' Results**

**Basic Financial Statements**

1. Type of auditors' report issued: Unmodified
2. Internal control over financial reporting:
- Material weakness(es) identified?       x       yes            no
  - Significant deficiency(ies) identified?            yes       x       none reported
3. Noncompliance material to basic financial statements noted?            yes       x       no

**Federal Awards**

1. Internal control over major federal programs:
- Material weakness(es) identified?            yes       x       no
  - Significant deficiency(ies) identified?            yes       x       no
2. Type of auditors' report issued on compliance for major federal programs: Unmodified
3. Any audit findings disclosed that are required to be reported in accordance with 2 CFR 200.516(a)?            yes       x       no

**Identification of Major Federal Programs**

**CFDA Number(s)**

**Name of Federal Program or Cluster**

93.243

Substance Abuse and Mental Health Services  
Projects of Regional and National Significance

Dollar threshold used to distinguish between

Type A and Type B programs: \$ 750,000

Auditee qualified as low-risk auditee?            yes       X       no

NATIVE AMERICAN DEVELOPMENT CORPORATION  
SCHEDULE OF FINDINGS AND QUESTIONED COSTS  
YEAR ENDED SEPTEMBER 30, 2022

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***Section II – Financial Statement Findings***

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**2022-001      **Material Weakness in Internal Control - Audit Adjustments****

Criteria or Specific Requirement: An internal control structure should be designed to identify adjusting journal entries, which are significant to an Organization's financial statements prepared in accordance with accounting principles generally accepted in the United States (GAAP).

Condition: As part of our audit, a number of adjustments and were proposed and recorded, significant in the aggregate, to properly state the consolidated financial statements in accordance with GAAP.

Context: During the audit, we identified various adjustments necessary to balance intercompany balances between Native American Development Corporation and its subsidiary American Indian Consulting Services (AICS).

Effect: We drafted several adjustments during the audit in order for balances to be materially correct.

Cause: Significant account balances were not reconciled to supporting detail.

Recommendation: McKenzie recommends a detail review of account balances on a periodic basis including the opening balances to the last audited financials. Implementation of a closing checklist would be beneficial to ensure all accounts are reconciled.

View of Responsible Official: See Management's Corrective Action Plan.

## Section IV – Prior Year Audit Findings

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### **Financial Statement Findings:**

**2021-001**

#### **Material Weakness in Internal Control - Audit Adjustments**

Criteria or Specific Requirement: An internal control structure should be designed to identify adjusting journal entries, which are significant to an Organization's financial statements prepared in accordance with accounting principles generally accepted in the United States (GAAP).

Condition: As part of our audit, a number of adjustments were proposed and recorded, significant in the aggregate, to properly state the consolidated financial statements in accordance with GAAP.

Context: During the audit, we identified various adjustments necessary across many different account balances including those between Native American Development Corporation and its subsidiary.

Effect: We drafted several adjustments during the audit in order for balances to be materially correct.

Cause: Significant account balances were not reconciled to supporting detail.

Recommendation: CLA recommends a detail review of account balances on a periodic basis. Implementation of a closing checklist would be beneficial to ensure all accounts are reconciled.

View of Responsible Official: See Management's Corrective Action Plan.



## ***Federal Award Findings:***

### ***2020-002      Significant Deficiency in Internal Controls - Reporting - Late Audit Submission***

Funding Agency: All Federal Agencies

Title: All Federal Awards

Assistance Listing Number: All assistance listing numbers listed on the Schedule of Expenditures of Federal Awards.

Criteria or Specific Requirement: As required by the Federal Register notice dated June 26, 2007, auditees are required to submit a completed Form SF-SAC, along with one complete reporting package to the Federal Audit Clearinghouse on/before the earlier of 30 days after receipt of the auditor's report or nine months after the end of the audit period. During 2020, this requirement was extended by six months for audits due June 30, 2022.

Condition: An SF-SAC report was not timely filed.

Context: Due to the COVID-19 pandemic and other extenuating circumstances the 2020 audit was not completed until April 2022. Management worked to engage a new CPA firm and began the transition in late April and May 2022. Audit fieldwork was not able to begin until June 2022 based on the new firm's availability. Due condensed timeline from the late issuance of the 2020 audit, the 2021 audit was unable to be submitted to the Federal Audit Clearinghouse in a timely manner.

Questioned Costs: To be determined by grantor.

Effect: The Organization is at risk of jeopardizing the continued funding provided by the federal agency.

Cause: Delays in issuing the September 30, 2020 financial statements led to a delay in this audit.

Recommendation: CLA recommends the Organization implement processes to ensure tasks are being completed timely and ready to be presented for audit within a timeframe that allows for the audit to be completed timely.

View of Responsible Official: See Management's Corrective Action Plan.

# Native American Development Corporation

17 North 26<sup>th</sup> Street Billings, Mt 59101 | P: 406.259.3804 | [www.nadc-nabn.org](http://www.nadc-nabn.org)



## Financial Statement Findings – Corrective Action Plan 2022

### 2022-001 Material Weakness in Internal Control - Audit Adjustments

**Recommendation:** McKenzie recommends a detail review of account balances on a periodic basis including the opening balances to the last audited financials. Implementation of a closing checklist would be beneficial to ensure all accounts are reconciled. The context of this finding is specifically to balance the intercompany balances between Native American Development Corporation and its subsidiary American Indian Consulting Services (AICS)

**Explanation of disagreement with audit finding:** Only a few balances were in question and resolution was provided by the client. Some of the balances in question are a result of the accounting system and the inability to correct errors or to adjust within the QuickBooks system.

**Action planned/taken in response to finding:** NADC has purchased a new accounting package that will fit our needs and adjust to the organization's growth. It was implemented on January of 2023. The accounts in question between AICS and NADC have been reconciled for the new system and the two companies are set up as separate entities with any revenue or expenditures being handled as intercompany transfers and balanced with the monthly close.

**Name(s) of the contact person(s) responsible for corrective action:** Marilyn Klein, CPA

**Planned completion date for corrective action plan:** 9/30/23

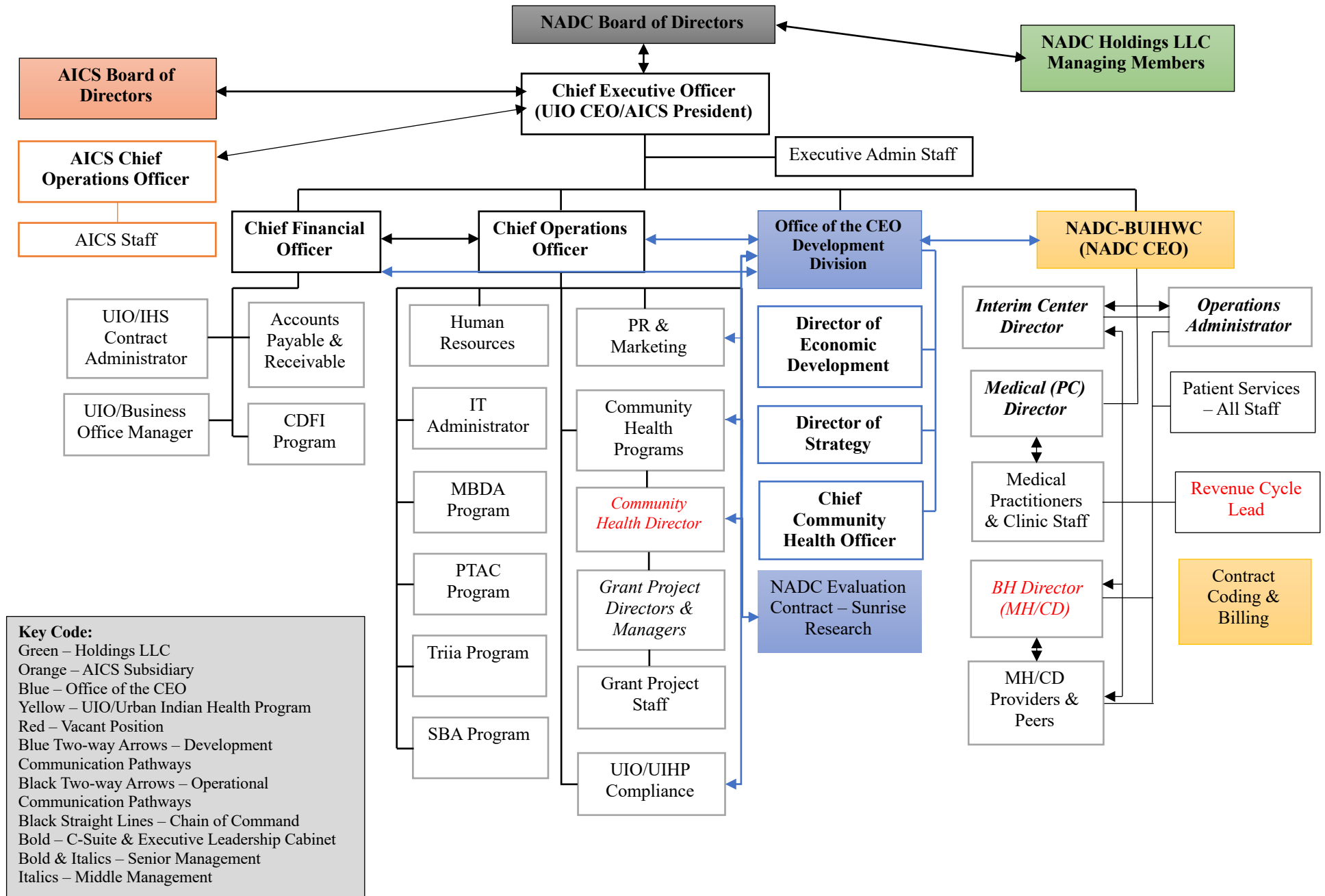
Signed:  Ben Sanders, CFO

Signed:  Leonard Smith, CEO

If the Department of Health and Human Services has questions regarding this plan, please call Marilyn Klein, CPA at (406) 259-3804.



Native American Development Corporation – Organizational Structure



PROJECT SOURCES AND USES					
Include all costs directly related to delivering this service or accomplishing this project. Must include all itemized costs above \$500. Sources must equal total project costs.					
Organization Name:		Native American Development Corporation			
Revenue Sources	Source:	Source:	Source:	Source:	Total Project Cost:
	HOME-ARP				
	\$1,029,623	\$	\$	\$	\$
Is this source confirmed and committed to the project?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
PROJECT STAFFING					
Include all costs directly related to delivering this service or accomplishing this project. If HOME-ARP funding will be used for Salaries / Wages, identify the source of all other funding for the position.					
Job Title: Project Coordinator	\$81,096	\$	\$	\$	\$
Job Title: Outreach Case Manager	\$77,233	\$	\$	\$	\$
Job Title: Community Support Specialist	\$64,375	\$	\$	\$	\$
Job Title: Special Projects Coord. (.2 FTE)	\$14,923				
OPERATING COSTS					
Outside Provider Payments	\$0	\$	\$	\$	\$
Supplies	\$2,880	\$	\$	\$	\$
Insurance	\$1,800	\$	\$	\$	\$
Printing	\$900	\$	\$	\$	\$
Information Technology	\$1,920	\$	\$	\$	\$
Travel	\$0	\$	\$	\$	\$
Contract Services	\$0	\$	\$	\$	\$
Other: Occupancy	\$96,000	\$	\$	\$	\$
Other: Client Supports	\$554,197	\$	\$	\$	\$
Other: Administration	\$134,299	\$	\$	\$	\$
<b>Grand Total:</b>	<b>\$1,029,623</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>
% of Budget Costs Considered Administration:					15%
Provide a brief budget narrative for each line item identified above. Include an explanation and justification on costs per beneficiary.					
Outside Provider Payments:					
Supplies: \$75 per month per 3.2 FTE for program-related supplies.					
Insurance: \$150 per month for general liability insurance					
Printing: \$75 per month printer contract for a network printer					
Information Technology: \$50 per month per 3.2 FTE					
Travel:					
Contract Services:					

Other: Occupancy, \$8,000 per month including market-rate rent and a proportionate share of the utilities
Other: Client Supports, to include allowable and unduplicated expenses such as: education services; employment assistance; financial assistance for rent, utilities, security deposits, and payment of rental arrears; food; transportation; and life skills training.
Other: Administration of 15% in lieu of the organization's Indirect Cost Rate of 27.7%
<p>Eligible Supportive Service Activities  \$554,197 – which equates to an average per beneficiary of \$1,583</p> <p>Direct Provision of Services  \$475,426 – which equates to an average per beneficiary of \$1,358</p>

# Native American Development Corporation

17<sup>th</sup> North 26<sup>th</sup> Street Billings, MT 59101 | P: 406.259.3804 F: 406.259.4569 | [www.nadc-nabn.com](http://www.nadc-nabn.com)



Billings Planning and Community Services  
Community Development (CD) Board  
2825 3<sup>rd</sup> Avenue North, 6<sup>th</sup> Floor  
Billings, MT 59101

RE: Home-ARP Request of Qualifications (RFQ)

Native American Development Corporation is honored to provide the Home-ARP Request of Qualifications (RFQ) responses to help with informed decision-making on the funding allocation entrusted to the City of Billings under the direction of the City Council.

As such, please accept the following responses to the RFQ.

1. Please describe NADC's ability to maintain and manage multiple waiting lists.

In keeping with the expectations of managing the distribution and equity of services, client waiting lists are organized much like patient waiting lists. Each department must conduct an initial intake assessment that captures individual demographic information, healthcare, housing, and other socio-economic or social determinants of health needs and priorities. When an individual is placed on a waiting list, the information is entered into an internal database tracking system. The tracking system includes the individuals' legal name, available contact information, the best way to reach individuals without reliable contact information, health, housing, and socio-economic indicators of needs are selected, service utilization, and is prioritized using a triage matrix (e.g., individual and others safety, non-emergent but urgent needs, emotional distressing situations or mental health crisis, non-emergent but critical risks). All efforts are made to provide an appointment with the wrap-around service team within 24 to 72 hours, depending on the date/time of the individual request for services. Every individual receives an appointment card that also provides essential contact information. In addition, each client works with the intake coordinator to complete an empowerment plan that helps identify all needs and what areas of supportive services are most important to the client to guide the care and recovery teams.

2. Please describe your policies and procedures for internal program referrals for clients (e.g., participants) within the organization.

NADC's policies and procedures place client safety, medical necessity, and critical needs at the forefront of the prioritization of referrals. Much like medical or mental health triage, all policies and procedures require staff to screen for safety, additional risk factors, and protective mechanisms to determine the acuity and urgency of medical and other direct services. From the medical model, NADC Billings Urban Indian Health



and Wellness Centers uses an integrative and multidisciplinary approach, more commonly a warm hand-off, where individuals with emergent needs are immediately linked to 911, and those in urgent and immediate need receive same-day crisis intervention and stabilization support. Individuals in non-emergent or non-urgent situations receive an appointment within 24 to 72 hours. Individuals with stable situations but upcoming risks are scheduled using the next best available appointment, at most 1 to 2 weeks of wait time, depending on the department and provider availability. Like other healthcare organizations, some wait times extend up to 3 weeks, but NADC takes every measure to manage waitlists using same-day appointment options when other individuals call and cancel a scheduled appointment with medical, mental health, and chemical dependency providers. Finally, the wrap-around service team with the NADC Native American Empowerment Program (NAEP) is responsible for coordinating, following up, and monitoring timely appointments and services. NADC's administrative management also provides direct oversight to ensure the timeliness of services, client and patient safety, and high-quality relational experiences that improve outcomes.

3. Please describe NADC's understanding of housing discrimination and the "Fair Housing Act".

NADC has a firm understanding of housing discrimination and the "Fair Housing Act" due to our commitment to serve identified needs of the clients we assist. Darrell LaMere is an NADC staff person with a passion for and experience in all aspects of Fair Housing and we have one current staff person, Maddison Wilhite, and two previous employees who have served as testers for Fair Housing compliance.

Mr. LaMere is the President of Montana Fair Housing, an anti-discrimination housing advocacy group. He is also on the Billings Salvation Army Advisory Board and a member of the Billings City Council's Human Relations Commission.

4. Has NADC's staff participated in any Fair Housing training in the last three years? If yes, please list training type(s), and date(s) of training.

Annual in-service training – most recent October 2023

5. What procedures will NADC implement to collect follow-up client data?

Our current NAEP follow up process includes completing a NOMS assessment six months after discharge. At the same time, our team keeps communication open on an ongoing basis through email, phone calls, text messages, and by asking for basic updates. It is part of our practice and values to remain a resource for the clients we serve, and they know they can come to us with a relapse or challenge of any kind. For the HOME-ARP program, we would implement a similar process, following the below structure:

Conduct adapted (simplified) NOMS assessments at 3 months, 6 months, and after that, annually. Simplified NOMS (National Outcome Measures) assessment outline:

**A. Substance Use**

- Have you used any substances (alcohol, drugs) in the past 30 days?
- Do you have any sober support, sponsorship, social support?



- Are you using any self-help such as Talking Circles, AA or other resources?

#### **B. Employment/Education**

- Are you currently employed or enrolled in an educational or vocational training program?

#### **C. Physical Health**

- How would you rate your overall physical health currently?
- Have you had any significant health issues or hospitalizations since your last assessment?

#### **D. Mental Health**

- How would you rate your overall mental health currently?
- Have you experienced symptoms of anxiety, depression, or other mental health concerns since your last assessment?

#### **E. Housing Status**

- What is your current housing situation within the last 30 days (e.g., stable, temporary, homeless)?
- If not homeless: are you renting or do you own, at sober living, staying with friends, other?

#### **F. Social Connectedness**

- Do you feel supported by family? Friends? Others in your community?

#### **G. Legal Issues**

- Have you had any new legal issues or involvement with the criminal justice system since your last assessment?
- Are you currently on probation or parole?

#### **H. Access to Services**

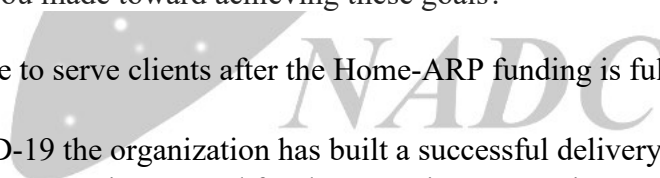
- Have you had any difficulties accessing mental health, substance use treatment, or other supportive services?
- Are there services you need that you have not been able to access?

#### **I. Recovery or Treatment Goals**

- Have you identified specific goals as part of your recovery or treatment plan?
- What progress have you made toward achieving these goals?

#### **6. How will NADC continue to serve clients after the Home-ARP funding is fully expended?**

Since the onset of COVID-19 the organization has built a successful delivery model for wraparound services, and we have seen a consistent need for these services to continue. For the past 28 months NADC was able to leverage funding from the Substance Abuse and Mental Health Services Administration to launch and refine a suite of services for homeless individuals and families or those at risk of homelessness. NADC operates a number of programs that support these clients, including recovery communities, peer support, restorative justice, housing equity, financial literacy, and other supportive services from a sustainability perspective. We will continue to seek funding, partnerships, and agreements to support these services from appropriate sources to continue this vital work prior to Home-ARP funding being fully expended. Future provision of this service delivery is important to the people being served, to this organization, and to the community as a whole.





7. Does NADC currently use the Homeless Management Information System HMIS? If not, is NADC willing to implement HMIS to meet program requirements?

NADC does not currently use the HMIS. However, NADC is willing and has extensive experience implementing and integrating new information systems for client data collection, analysis, and management. NADC's information systems integrations include but are not limited to: electronic health records, laboratory information systems, grants management systems, financial information systems, funding agency data portals, and national database information systems to ensure the accuracy of data collection, practical analysis, performance metric, data management, and to support federal, state, and local funding allocation based on quantitative needs analysis.

8. After reviewing these additional questions, requirements, and clarifications, NADC does not want to adjust any of the supportive services activities proposed in the original application. However, we do intend to expand on the program as time and resources allow. This will include establishing a weekly schedule of additional on-site client support services such as financial literacy, healthy foods education, immunizations, medical services, and behavioral health services. Basically, creating a One-Stop Shop for a range of client-driven supportive services.
9. NADC is not hiring staff to carry out the Home-ARP supportive services. NADC's current positions were previously funded through a 16-month SAMHSA COVID-19 emergency response opportunity. The creative flexibility of these funds permitted NADC to create and refine the existing and proposed supportive services. As this SAMHSA funding concludes, NADC's impact evaluation highlighted the essential importance of the services proposed and requires additional funding to help continue these endeavors while pursuing a more suitable framework and other sources of funding. NADC is confident that with the Home-ARP funds we will be able to continue the delivery of services and secure additional funds through private and public funding sources. The development team is actively seeking funds that will allow service to be sustained.
10. In response to the position description and required Project Manager qualifications, NADC is in the process of updating the job description. Due to the process involved in updating we have not been able to complete this as quickly as needed.

The organization currently employs two people who are qualified to serve as an interim PM and we will advertise for the PM position to ensure the integrity of the position requirements and the fiduciary responsibilities being entrusted to NADC. We also request input from a member of the City's Home-ARP Citizen advisory committee on the final job description as well as participation in the interview process to ensure that NADC meets or exceeds expectations for this pivotal position.

11. In response to what building is currently being rented to carry out these activities, and how the rent is currently being paid, and why Home-ARP is needed?

The current NAEP positions are housed within the Billings Urban Indian Health & Wellness Center (BUIHWC) and over the past several years, NADC and Billings First Church have cultivated a strong



partnership with mission alignment. Home-ARP funds will be used to pay rent at First Church as NADC believes this is a more appropriate and well-established location for the provision of services in this proposal. Full execution of the proposed services will require more space than is available or feasible at BUIHWC and First Church is willing to be an active partner in this project.

Home-ARP funds are needed to pay rent in this larger, more suitable facility which can accommodate the range of supportive services requested to fulfill the intent of the funding and meet the needs of the homeless prevention supportive service activities.

Please let us know if you have any additional questions.

The NADC/BUIHWC/NAEP Team

