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Form **990-EZ**

Short Form
Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter social security numbers on this form as it may be made public.
▶ Information about Form 990-EZ and its instructions is at www.irs.gov/form990.

OMB No 1545-1150

2015

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

A For the 2015 calendar year, or tax year beginning 01-01-2015 , and ending 12-31-2015

B Check if applicable
☐ Address change
☐ Name change
☐ Initial return
☐ Final return/terminated
☐ Amended return
☐ Application pending

C Name of organization
FORWARD MT

Number and street (or P O box, if mail is not delivered to street address) Room/suite
136 EAST BROADWAY

City or town, state or province, country, and ZIP or foreign postal code
MISSOULA, MT 59802

D Employer identification number
13-4285849

E Telephone number
(406) 542-8683

F Group Exemption Number ▶

G Accounting Method ☑ Cash ☐ Accrual Other (specify) ▶

H Check ▶ ☐ if the organization is **not** required to attach Schedule B (Form 990, 990-EZ, or 990-PF)

I Website: ▶ WWW FORWARDMONTANA ORG

J Tax-exempt status (check only one) - ☐ 501(c)(3) ☑ 501(c)(4) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527

K Form of organization ☑ Corporation ☐ Trust ☐ Association ☐ Other

L Add lines 5b, 6c, and 7b to line 9 to determine gross receipts If gross receipts are $200,000 or more, or if total assets (Part II, column (B) below) are $500,000 or more, file Form 990 instead of Form 990-EZ ▶ $ 89,976

Part I **Revenue, Expenses, and Changes in Net Assets or Fund Balances** (see the instructions for Part I)
Check if the organization used Schedule O to respond to any question in this Part I ☑

Revenue	1	Contributions, gifts, grants, and similar amounts received		1	27,388
	2	Program service revenue including government fees and contracts		2	4,000
	3	Membership dues and assessments		3	58,377
	4	Investment income		4	5
	5a	Gross amount from sale of assets other than inventory	5a		
	b	Less cost or other basis and sales expenses	5b	0	
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)		5c	
	6	Gaming and fundraising events			
	a	Gross income from gaming (attach Schedule G if greater than $15,000)	6a		
	b	Gross income from fundraising events (not including $ _____ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds $15,000)	6b	0	
	c	Less direct expenses from gaming and fundraising events	6c	0	
	d	Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)		6d	
	7a	Gross sales of inventory, less returns and allowances	7a	206	
	b	Less cost of goods sold	7b	0	
	c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)		7c	206
	8	Other revenue (describe in Schedule O)		8	
	9	**Total revenue.** Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 ▶		9	89,976
Expenses	10	Grants and similar amounts paid (list in Schedule O)		10	
	11	Benefits paid to or for members		11	
	12	Salaries, other compensation, and employee benefits		12	81,972
	13	Professional fees and other payments to independent contractors		13	2,574
	14	Occupancy, rent, utilities, and maintenance		14	6,838
	15	Printing, publications, postage, and shipping		15	5,022
	16	Other expenses (describe in Schedule O)		16	25,787
	17	**Total expenses.** Add lines 10 through 16 ▶		17	122,193
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)		18	-32,217
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)		19	68,175
	20	Other changes in net assets or fund balances (explain in Schedule O)		20	
	21	Net assets or fund balances at end of year Combine lines 18 through 20 ▶		21	35,958

Part II Balance Sheets (see the instructions for Part II)
Check if the organization used Schedule O to respond to any question in this Part II . . . . . ☑

		(A) Beginning of year		(B) End of year
22	Cash, savings, and investments	49,593	22	21,654
23	Land and buildings		23	
24	Other assets (describe in Schedule O)	18,582	24	14,304
25	**Total assets**	68,175	25	35,958
26	**Total liabilities** (describe in Schedule O)		26	
27	**Net assets or fund balances** (line 27 of column (B) **must** agree with line 21)	68,175	27	35,958

Part III Statement of Program Service Accomplishments (see the instructions for Part III)
Check if the organization used Schedule O to respond to any question in this Part III ☐

Expenses (Required for section 501 (c)(3) and 501(c)(4) organizations, optional for others)

What is the organization's primary exempt purpose?
TRAIN, MOBILIZE, AND ELECT THE NEXT GENERATION OF YOUNG LEADERS IN THE STATE OF MONTANA

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title

28
FORWARD MONTANA'S MISSION IS TO TRAIN, MOBILIZE AND ELECT THE NEXT GENERATION OF PROGRESSIVE LEADERS IN THE STATE OF MONTANA TRAIN FORWARD MONTANA TRAINS YOUNG PEOPLE IN HOW TO MANAGE CAMPAIGNS, BOTH FOR ISSUES & CANDIDATES WE TRAIN INTERNS AND VOLUNTEERS IN THE ART AND SCIENCE OF GRASSROOTS ORGANIZING AND ISSUE ADVOCACY IN 2015, FORWARD MONTANA HELPED TRAIN30 INTERNS AND FELLOWS, AS WELL AS MOBILIZED HUNDREDS OF VOLUNTEERS TO DONATETIME FOR ACTIVITIES COMMUNITY BUILDING FORWARD MONTANA HOSTS HAPPY HOURS AND PUBLIC INFORMATION NIGHTS TO EDUCATE AND ACTIVATE YOUNG PEOPLE AROUND CURRENT EVENTS IN THEIR COMMUNITY AND IN MONTANA IN 2015, FORWARD MONTANA HELD SEVERAL PROGRESSIVE HAPPY HOURS, INCLUDING DEBATE AND ELECTION NIGHT WATCH PARTIES MOBILIZE FORWARD MONTANA SUPPORTED THE PASSAGE OF TWO SCHOOL BONDS TO IMPROVE PUBLIC EDUCATION AND INFRASTRUCTURE FOR YOUNG PEOPLE IN MISSOULA COUNTY THEY TALKED TO YOUTH ABOUT THE IMPORTANCE OF THE SCHOOL BONDS, COLLECTING 812 PLEDGE TO VOTE CARDS, MAKING 10,245 PHONE OR DOOR ATTEMPTS TO CONTACT PEOPLE, AND HAVING CONVERSATIONS WITH 2,126 PEOPLE THEY FILLED 168 VOLUNTEER SHIFTS AND CARRIED OUT 478 VOLUNTEER HOURS THEY ACTIVATED THEIR YOUTH BASE TO CONTACT MEMBERS OF THE LEGISLATURE 1,897 TIMES ON BEHALF OF ISSUES IMPORTANT TO YOUNG PEOPLE, INCLUDING POLICIES IN SUPPORT OF A TUITION FREEZE, MEDICAID EXPANSION, A STATEWIDE NON-DISCRIMINATION ORDINANCE AND IN OPPOSITION TO THE REVOKING OF LICENSES BASED ON STUDENT LOAN DEBT THEY ORGANIZED 64 PEOPLE TO TRAVEL TO THE STATE CAPITOL IN SUPPORT OF A STATEWIDE NON-DISCRIMINATION ORDINANCE VOTER EDUCATION FORWARD MONTANA DISTRIBUTED 30,000 VOTER GUIDES IN MISSOULA, GALLATIN AND YELLOWSTONE COUNTIES THESE GUIDES WERE INTENDED TO SHOW YOUNG PEOPLE WHERE CANDIDATES STOOD ON ISSUES THAT MATTER TO YOUNG PEOPLE FORWARD MONTANA PRODUCED YOUTUBE VIDEOS, ENTITLED 2LEGIT TO UPDATE THE PUBLIC ABOUT WHAT IS GOING ON IN THE STATE LEGISLATURE, REACHING 20,878 VIEWS THEY ALSO CO-HOSTED STUDENT VOTER DAYS ON THE UNIVERSITY OF MONTANA AND MONTANA STATE UNIVERSITY CAMPUS
(Grants $ 122,193) If this amount includes foreign grants, check here . . . ▶ ☐ **28a**

29
(Grants $) If this amount includes foreign grants, check here . . . ▶ ☐ **29a**

30
(Grants $) If this amount includes foreign grants, check here . . . ▶ ☐ **30a**

31 Other program services (describe in Schedule O)
(Grants $) If this amount includes foreign grants, check here . . . ▶ ☐ **31a**

32 Total program service expenses (add lines 28a through 31a) . . . . . ▶ **32** 122,193

Part IV List of Officers, Directors, Trustees, and Key Employees (list each one even if not compensated — see the instructions for Part IV)
Check if the organization used Schedule O to respond to any question in this Part IV . . . . . ☐

(a) Name and title	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC) **(if not paid, enter -0-)**	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
CHASE MOHNEY President	1 00	0		
PARI KEMMICK Director	1 00	0		
LINDSAY MURDOCK Director	0 50	0		
JEN GURSKY Director	0 50	0		
JOHN BRUEGGEMAN Director	0 50	0		
BRYAN WATT Director	0 50	0		
JESSICA GRENNAN Director	0 50	0		
CLAYTON ELLIOT Treasurer	0 50	0		
KAYJE BOOKER CEO	24 00	21,271		
TESS A CARLSON DIRECTOR OF OPERATIONS	16 00	3,200		

Part V **Other Information** (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V) Check if the organization used Schedule O to respond to any question in this Part V . . . . . ☐

			Yes	No
33	Did the organization engage in any significant activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O	33		No
34	Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name Otherwise, explain the change on Schedule O (see instructions)	34		No
35a	Did the organization have unrelated business gross income of $1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?	35a		No
b	If "Yes," to line 35a, has the organization filed a **Form 990-T** for the year? If "No," provide an explanation in Schedule O	35b		No
c	Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If "Yes," complete Schedule C, Part III	35c		No
36	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N	36		No
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ 37a			
b	Did the organization file **Form 1120-POL** for this year?	37b		No
38a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee **or** were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return? . .	38a		No
b	If "Yes," complete Schedule L, Part II and enter the total amount involved . 38b			
39	Section 501(c)(7) organizations Enter			
a	Initiation fees and capital contributions included on line 9 . . . . . 39a 0			
b	Gross receipts, included on line 9, for public use of club facilities 39b 0			
40a	Section 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under section 4911 ▶ _____, section 4912 ▶ _____, section 4955 ▶ _____			
b	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations Did the organization engage in any section 4958 excess benefit transaction during the year, or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I	40b		No
c	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations Enter amount of tax imposed on organization managers or disqualified persons during the year under sections4912, 4955, and 4958 ▶ _____			
d	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations Enter amount of tax on line 40c reimbursed by the organization . . . . . ▶ _____			
e	All organizations At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T	40e		No

41 List the states with which a copy of this return is filed ▶ _____

42a The organization's books are in care of ▶ RACHEL HUFF-DORIA Telephone no ▶ (406) 542-8683

Located at ▶ 136 EAST BROADWAY SUITE 1 MISSOULA, MT ZIP + 4 ▶ 59802

			Yes	No
b	At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	42b		No
	If "Yes," enter the name of the foreign country ▶ _____			
	See the instructions for exceptions and filing requirements for **FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR)**			
c	At any time during the calendar year, did the organization maintain an office outside the U S ?	42c		No
	If "Yes," enter the name of the foreign country ▶ _____			

43 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of **Form 1041** - Check here . . . . . ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the tax year . . . . ▶ 43

			Yes	No
44a	Did the organization maintain any donor advised funds during the year? If "Yes," Form 990 must be completed instead of Form 990-EZ	44a		No
b	Did the organization operate one or more hospital facilities during the year? *If "Yes," Form 990 must be completed instead of Form 990-EZ*	44b		No
c	Did the organization receive any payments for indoor tanning services during the year?	44c		No
d	If "Yes," to line 44c, has the organization filed a Form 720 to report these payments? *If "No," provide an explanation in Schedule O*	44d		No
45a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	45a		No
45b	Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," Form 990 and Schedule R may need to be completed instead of Form 990-EZ (see instructions)	45b		No

		Yes	No
46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	46		No

Part VI Section 501(c)(3) organizations only

All section 501(c)(3) organizations must answer questions 47-49b and 52, and complete the tables for lines 50 and 51

Check if the organization used Schedule O to respond to any question in this Part VI ☐

			Yes	No
47	Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	47		
48	Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	48		
49a	Did the organization make any transfers to an exempt non-charitable related organization?	49a		
b	If "Yes," was the related organization a section 527 organization?	49b		

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than $100,000 of compensation from the organization If there is none, enter "None "

(a) Name and title of each employee	(b) Average hours per week devoted to position	(c) Reportable compensation (Forms W-2/1099-MISC)	(d) Health benefits, contributions to employee benefit plans, and deferred compensation	(e) Estimated amount of other compensation
NONE				

f Total number of other employees paid over $100,000 ▶

51 Complete this table for the organization's five highest compensated independent contractors who each received more than $100,000 of compensation from the organization If there is none, enter "None "

(a) Name and business address of each independent contractor	(b) Type of service	(c) Compensation
NONE		

d Total number of other independent contractors each receiving over $100,000. ▶

52 Did the organization complete Schedule A? **NOTE.** All Section 501(c)(3) organizations must attach a completed Schedule A ▶ ☐ Yes ☐ No

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here

****** 2016-05-13

Signature of officer Date

RACHEL HUFF-DORIA Executive Director

Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☑ if self-employed	PTIN
HEIDI A FOLEY				P00942235
Firm's name ▶ Heidi A Foley CPA CFE			Firm's EIN ▶	
Firm's address ▶ 111 N Higgins Ave Missoula, MT 59802			Phone no (406) 546-9912	

May the IRS discuss this return with the preparer shown above? See instructions ▶ ☑ Yes ☐ No

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SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.
▶ Attach to Form 990 or 990-EZ.
▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2015

Open to Public Inspection

Name of the organization	Employer identification number
FORWARD MT	13-4285849

990 Schedule O, Supplemental Information

Return Reference	Explanation
Other Expenses 1001	Advertising and Promotion $986
Other Expenses 1012	Insurance $960
Other Expenses 1	SUPPLIES $9887
Other Expenses 2	TRAVEL AND MEALS $4403
Other Expenses 4	TECH AND COMMUNICATIONS $3258
Other Expenses 5	DUES AND SUBSCRIPTIONS $2230
Other Expenses 6	PAYROLL PREPARATION FEES $1411
Other Expenses 7	BANK SERVICE CHARGES $1393
Other Expenses 8	FACILITY RENTAL $1021
Other Expenses 10	TRAINING $127
Other Expenses 11	FURNITURE & EQUIPMENT $96
Other Expenses 12	LICENSES $15
Other Assets 1	RECEIVABLE FROM FORWARD MONTANA - Beginning $18582 RECEIVABLE FROM FORWARD MONTANA - Ending $13954
Other Assets 2	DAMAGE DEPOSIT - Beginning $0 DAMAGE DEPOSIT - Ending $350
COST SHARING AGREEMENT	FORWARD MONTANA 501(C)4 AND THE FORWARD MONTANA FOUNDATION 501(C)3 HAVE ENTERED INTO A COS T SHARING AGREEMENT TO MINIMIZE DUPLICATED EXPENSES AND TO CARRY OUT THEIR COMPLIMENTARY M ISSIONS IN AN ECONOMICAL AND EFFICIENT MANNER THROUGH THE SHARING OF EMPLOYEES, OFFICE SPA CE, AND EQUIPMENT