



April 15, 2024

# **Big Sky Resort Area District**

Proposal for incorporation exploration study



April 15, 2024

Daniel Bierschwale, Executive Director  
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Dear Mr. Bierschwale:

Thank you for the opportunity to share our qualifications to assist Big Sky Resort Area District (the District) with the completion an incorporation exploration study. Baker Tilly US, LLP (Baker Tilly) has extensive knowledge and experience with incorporation analysis and all manner of public sector organizational management processes and practices and is ideally suited to furnish support to you on this important assignment. We also have worked in and understand the unique dynamics of resort communities.

Benefits of working with Baker Tilly include:

#### The right firm

The District will benefit from our significant understanding of the complexity of local government and public-sector entities and our specialized public sector practice with approximately 350 staff members, including more than 40 principals.

#### The right experience

Baker Tilly is a leader in consulting services. We have conducted many studies that are similar in scope to your project and educated clients on how to successfully implement results. You will benefit from our public sector expertise.

#### The right team

Our proposed team includes members with experience working in local government who understand the requirements, challenges and opportunities unique to the public sector. You will receive a tailored approach designed to meet your needs and exceed your expectations.

#### The right value

In addition to unique requirements, the public sector must serve as careful stewards of the funding they receive. Our significant level of partner and manager involvement and targeted use of technology solutions translate into high-quality service for a fair and reasonable fee.

Big Sky Resort Area District will be a valued client of Baker Tilly, and I will be personally involved in all aspects of our relationship, from planning through completion. Thank you for the opportunity to make tangible contributions to your success. Our team is excited to earn your trust, and we look forward to discussing your questions and feedback.

Sincerely,

A handwritten signature in blue ink that reads "Carol Jacobs".

Carol Jacobs, Managing Director  
Baker Tilly US, LLP  
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# Contents

EXHIBIT B .....	1
UNDERSTANDING OF NEED .....	2
APPROACH.....	5
EXPERIENCE AND AVAILABILITY OF PROJECT TEAM .....	11
REFERENCES.....	15
COST .....	17
APPENDIX A: RESUMES .....	20
APPENDIX B: LICENSE.....	26



**Baker Tilly is responsive, interactive and produces the results they say they will. We are very pleased with the services they provide and consider Baker Tilly a leader among accounting and advisory firms.**

*Controller*



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# Exhibit B

RFP 24-0327  
Human Resources Consulting  
CareerSource Pinellas

## ATTACHMENT 3: DISCLOSURE / CONFLICT OF INTEREST STATEMENT

**Respondent:** Baker Tilly US, LLP

The award hereunder is subject to the provisions of Chapter 112, Florida Statutes. Contractors must disclose with their replies whether any officer, director, employee or agent is also an officer or an employee of CareerSource Pinellas or CareerSource Tampa Bay. All firms must disclose the name of any officer or employee who owns, directly or indirectly, an interest of more than five percent (5%) in the Respondent's firm or any of its branches or affiliates. All Respondents must also disclose the name of any employee, agent, lobbyist, previous employee of CareerSource Pinellas or CareerSource Tampa Bay or other person, who has received or will receive compensation of any kind to seek to influence the actions of CareerSource Pinellas or CareerSource Tampa Bay in connection with this procurement, or who has registered or is required to register under Section 112.3215, Florida Statutes in connection with this procurement.

The following persons are officers, directors, employees, or agents of Respondent's firm **and** state officers or employees:

1. N/A
2. \_\_\_\_\_
3. \_\_\_\_\_

The following persons are officers or employees who own, directly or indirectly, more than 5% interest in the Respondent's firm:

1. No partner holds more than 2% ownership stake in our firm.
2. \_\_\_\_\_
3. \_\_\_\_\_



\_\_\_\_\_  
\*Authorized Representative's Signature

Dan Hedden, Partner  
Typed Name and Title of Authorized Representative

**\*This individual must have the authority to bind the respondent.**

# Understanding of need

*Big Sky Resort Area District Name needs an incorporation exploration study, and Baker Tilly's consulting professionals provide public sector specialized services to help our clients drive transformation and innovation — addressing the needs of today while capitalizing on the opportunities of tomorrow.*

## Understanding your needs to help achieve your objectives and goals

As a public sector organization, Big Sky Resort Area District is looking for an incorporation exploration study. You deserve to work with dedicated public sector specialists who go far beyond simply putting the right numbers in the right boxes. You require a dedicated team who will support your goals — the value you have worked hard to create and grow — and who will offer incorporation exploration study services that meet your needs now and as they evolve.

Public sector clients like the District are central to our business, and we apply experience-based insight to help solve problems and look ahead to opportunities. The following table details how we plan to address your needs in a valuable way.

WHAT WE UNDERSTAND THE DISTRICT NEEDS	HOW BAKER TILLY WILL MEET YOUR NEEDS
<b>Relevant public sector industry experience, specialization and expertise</b>	<ul style="list-style-type: none"><li>• Specialized knowledge and direct experience gained from serving more than 4,000 public sector clients like Big Sky Resort Area District</li><li>• Support from more than 350 team members who are deeply entrenched in the public sector industry and receive focused training and continuing education</li><li>• In-depth understanding of the unique nature of your organization and ability to proactively address your most pressing challenges</li></ul>
<b>Responsive, collaborative engagement team dedicated to serving public sector clients</b>	<ul style="list-style-type: none"><li>• Thoughtful, strategic guidance from a consistent team that will serve you year after year — enhancing your impact over the long term</li><li>• Handpicked public sector specialists who will deliver big-picture insights and best practices</li><li>• Engagement team leaders who are involved in public sector associations</li><li>• Commitment to year-round accessibility, continuity and communication</li><li>• Cohesive integration between accounting, tax and advisory services</li></ul>
<b>Value for fees paid</b>	<ul style="list-style-type: none"><li>• Competitive fee arrangements, without additional charges for every question, comment or concern and without extra onboarding or transition costs</li><li>• Significant partner and manager involvement to deliver timely service</li></ul>

### YOU RECEIVE MANY BENEFITS BY CHOOSING TO WORK WITH BAKER TILLY

*We understand your needs and will meet your objectives with our ability to offer valuable resources, experience and solutions.*



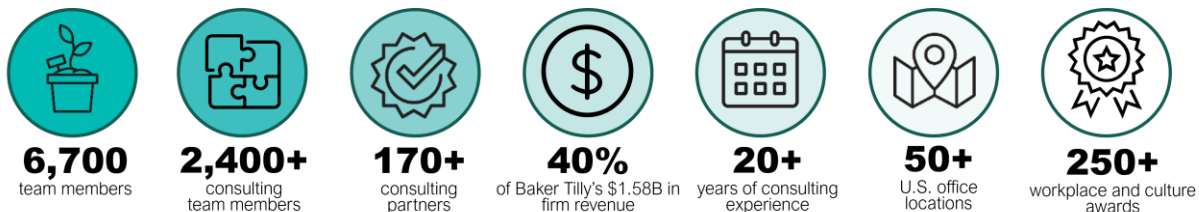
## Offering our resources: Baker Tilly consulting at a glance

Making decisions today to shape tomorrow is especially challenging in these extraordinary times. **Big Sky Resort Area District requires a firm with consulting specialists who combine functional experience, industry knowledge and technical expertise to respond to your immediate needs and support you as your organization evolves. Baker Tilly is that firm.** We pay special attention to the intersection of strategy and execution to deliver:

- Innovative and pragmatic approaches for assessing changes, adapting quickly, implementing best practices and competing in any environment
- Services to enhance and protect the enterprise value you have worked so hard to achieve
- Strategies to identify and mitigate potential risks
- Solutions for your toughest challenges

When you work with Baker Tilly on your advisory needs, you work alongside an agile team that drives transformation by supporting you with a flexible engagement model that is “right sized” to your unique culture and circumstances. We dedicate ourselves to delivering industry insights, efficiencies, creativity and forward-thinking solutions.

Below are some key facts about our consulting practice, including the depth of resources that stand ready to support your core project team:



### COMPREHENSIVE EXPERIENCE TO SERVE YOU

*Big Sky Resort Area District will receive support and guidance from a respected advisory CPA firm that continues to grow.*


Effective on or around June 1, 2024, all consulting and tax engagements will be performed by Baker Tilly Advisory Group, LP. All assurance engagements will continue to be performed by Baker Tilly US, LLP.

## Delivering specialized expertise to our public sector clients


State and local government is a complex, unique environment shaped by fiscal, regulatory and operational considerations not found in other industries. Recognizing this complexity and eager to serve as a true valued advisor to the public sector, Baker Tilly formalized its dedicated public sector specialization more than 50 years ago. **Today, more than 350 Baker Tilly professionals — including nearly 30 partners — focus directly on serving governments and provide hundreds of thousands of client service hours annually to organizations like the District.**




Nationwide, our public sector practice serves nearly 4,000 state and local governmental entities, including municipalities, counties, school districts, utilities, transit organizations, airports and special authorities. Several of these client groups are now served by dedicated specialists in distinct sub-practices.



**4,000 public sector clients**



**90+ years of industry experience**



**Serving clients nationwide**

### COMMITMENT TO THE PUBLIC SECTOR

*Baker Tilly has been in business for more than 90 years, and public sector entities were some of our first clients.*

## Sharing a culture of values with Big Sky Resort Area District to serve as the foundation of our lasting relationship

Our core values infuse our culture and drive the way we plan to work with Big Sky Resort Area District. They are what we believe in and what we expect from each other. They guide our decisions, inspire our actions and impact how we do business. They are shorthand for what we stand for — and what we stand against. Our core values are fundamental and timeless and come to life through our own experiences and personal expression. These core values are highlighted below.

 <p><b>BELONGING</b></p> <p>We foster a deep level of mutual respect where each one of us feels seen, heard, valued and connected. We commit to a diverse and inclusive workplace upheld by fairness, compassion and equality.</p>	 <p><b>COLLABORATION</b></p> <p>We are at our best when we work together. We build on our collective strength to achieve more than we can as individuals.</p>	 <p><b>INTEGRITY</b></p> <p>We do the right thing, for the right reason, every day. Honesty, trust and keeping our promises are paramount to our success.</p>	 <p><b>PASSION</b></p> <p>We put forth our best effort every day for the benefit of our people, clients and firm. There is a sense of urgency and relentless energy in everything we do. We love our profession and take great pride in it.</p>	 <p><b>STEWARDSHIP</b></p> <p>We invest for the future with the intention of leaving everything better. We strive to make a positive difference and leave a proud legacy.</p>
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### SHARED CULTURES, VALUES, PHILOSOPHIES AND GOALS

*Big Sky Resort Area District and Baker Tilly have a strong cultural fit, and our commonalities will lay the foundation for trust, open communication, a seamless project approach and an enduring relationship.*

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# Approach

*Our relationship-driven approach is powered by technology and led by partners and managers who deliver a cost-effective, quality engagement for Big Sky Resort Area District. We will deliver incorporation exploration study solutions that address the public sector industry's underlying complexities and your unique opportunities.*

## Proposed plan of work

The Big Sky Resort Area District (District) is located midway between West Yellowstone and Bozeman, Montana in southwest Montana, near Yellowstone National Park the first national park created in the United States. The District levies a resort tax authorized under Montana State law and uses proceeds from the tax to support municipal and nonprofit services to the community. The District currently provides a variety of important services including support for public works, support for the fire department, housing, arts and education, transit support and other services to the community. It works in conjunction with other special districts such as the Big Sky Fire Department, the Big Sky Water and Sewer District and the Madison Valley Hospital District.

Big Sky is a spectacularly scenic area home to the largest skiing area in the country and with full-season recreational opportunities including fly fishing, hiking, kayaking, golfing and more.

The Big Sky community has grown rapidly since 2000, and a more unified approach to local government has become a frequent topic of conversation, most recently in early 2023 when a subcommittee of District board and staff along with community members met for several days, and ultimately produced a report entitled Governance and Community Engagement Exploration in September 2023.

This report did not reach any firm conclusions, but it did provide a framework for how the community could objectively approach the consideration of the important question of incorporation. It laid out several important deliverables that needed to be addressed in any incorporation study and led to the RFP which resulted in this proposal.

Incorporation efforts tend to be both technical and emotional undertakings. On one hand the costs of running a municipality have to be covered by the revenues that can be generated, and new additional taxes are generally not wanted. A solid technical analysis is necessary to nail this issue down. From an emotional standpoint residents worry that the critical sense of place that they cherish could somehow be damaged or diminished by a new government or "layer of government." Again, honest analysis of whatever worries are at the root of these issues be they "code enforcement" or other issues needs to be objectively explored. The bottom line is that objective analysis is necessary to get the facts on all matters related to incorporation and an honest, objective consultant is a necessary partner for any community exploring this big question. Baker Tilly can be this partner for Big Sky. We have solid expertise in the questions at issue without having any stake in the Big Sky community beyond wanting to provide the help needed.

It should be noted that incorporations are relatively uncommon in Montana. The last city incorporated in the State was Colstrip in 1998



Baker Tilly has extensive relevant experience, and we would be pleased to help with this important work. We have outlined a plan of work below that we believe is responsive to the aims of the District. We would be happy to refine it as needed.

### Activity 1 — Start project

We will begin this project with a careful learning phase, starting with a review of background documents such as the work done by collaboration that prepared the recent Governance and Community Engagement Exploration report, current boundaries of the District as well as boundary alternatives, current boundaries of the special districts serving the area and relevant budget information.

We will then meet with the District management and board members, members of affected local agencies and other key stakeholders to discuss the documents and the current climate regarding possible incorporation, and to tailor the scope of work and the schedule to your needs.

The project start-up activity forms the foundation of the relationship between Baker Tilly's team and District leaders. We know that the work associated with this analysis is in addition to the normal work of the organization. Our goal is to integrate our activities in a manner that is thoughtful and minimizes disruption to the District's operations. However, the cooperation of staff in providing requested data and giving meaningful feedback is crucial to a successful project.

After our initial kickoff meetings, we will prepare a statement of understanding/revised scope for the project to guide our work. We will keep you informed of our progress, observations and initial recommendations, as well as recommendations for modification to the scope as warranted by our analysis and observations.

***Deliverables:*** Meeting agendas, meeting attendance, statement of project understanding/scope

***Schedule:*** Weeks 1 and 2

### Activity 2 — Gather information for municipal services plan

During this activity, we will gather information from the District, the counties of Gallatin and Madison to develop a study methodology and a database that identifies the municipal services that a City of Big Sky would provide and the associated costs, staffing and equipment needs. We will use the following techniques to gather information.

- **Interview officials.** While we will have gathered some relevant information during the first activity, we will likely have additional questions for District and County staff about the municipal services a city might be expected to provide. We will conduct additional interviews as needed at the outset of this activity and again toward the end, if needed.
- **Review documents.** We will examine previous reports completed by the District and other interested parties concerning possible incorporation such as the efforts led by the Big Sky Owners Association in 2002, the Big Sky Chamber of Commerce in 2004, the Montana State University Center for Local Governance in 2014 and the Big Sky Local Government LLC in 2022 concerning possible incorporation as well as any other relevant information.
- **Provide documentation of services provided by nearby municipalities.** We will examine the services provided by nearby municipalities by reviewing documents and interviewing representatives of the cities, as needed. This will allow us to construct a fuller picture of the services provided by peer cities and associated staffing and expenditure levels.

At the conclusion of our interviews and data collection, we will summarize major observations. This summary will allow us to determine if the data we have gathered is sufficient, or whether additional data and information will be needed for Activity 3.

**Deliverables:** Meeting agendas, notes for meetings with staff, database of current services, summary of major observations

**Schedule:** Weeks 1 through 6

### Activity 3 — Public outreach and stakeholder engagement

During this activity, we will engage residents and stakeholders through the following activities:

- **General citizen engagement** — We will work the staff and existing governance structure to determine the audience of general citizens within the designated census space of Big Sky and other key citizen groups to complete an online resident survey. The purpose of the online survey is to gather information on the perceived challenges and opportunities related to incorporation. Typically, we rely on the client/local staff to publicize the survey. The survey is open for 30-60 days at the start of the project to maximize citizen input in the process.
- **Engagement of key stakeholders in Big Sky** — Using a series of six to eight in-person or online focus groups, we will engage key stakeholders in the Big Sky community to understand the perceived challenges and opportunities related to incorporation. An initial group of stakeholders could include business owners, employers, seasonal and FTE employees, investors, homeowners, relators, apartment owners and renters and the Big Sky Chamber of Commerce. We will work with the project staff to identify additional key stakeholders that should be included.
- **Selected community interviews across the state of Montana** — Baker Tilly will identify peer communities and benchmarks across Montana that include communities with the resort tax, the lodging facility sales and use tax, and with no special local option sales tax. Communities such as Livingston, MT; Anaconda, MT; Lewistown, MT; will be evaluated for incorporation of best practices, as well as resort communities that do not use the available resort tax tool. Our initial target for this evaluation will be interviews and evaluation of four (4) benchmark communities, with the best peers determined in conversation with the client after an initial review. Additional community interviews and analysis can be conducted with direction from the client, if expanded scope and budget is available.

### Activity 4 — Develop a draft municipal services plan

During this activity, we will analyze the information collected during Activity 1-3 . Our analysis will include:

- Current municipal services and service delivery levels provided by the District, counties, special districts and other agencies
- Results of meetings and data gathered from relevant stakeholders and agencies
- A comparison of service level needs of Big Sky and typical incorporated nearby communities in Montana
- Identification of all the municipal services that an incorporated Big Sky would provide, along with the benefits and expenditures associated with each.

After our analysis is complete, we will begin to formulate a draft municipal services plan that includes:

- Our understanding of current service levels
- Results of our information gathering and interviews
- Services and staffing suggested by our analysis of nearby and peer jurisdictions and stakeholders
- The needed organizational structure to provide the identified services
- The preferred mechanism for providing the service (such as contracting with public or private entities)

After this analytical work is complete, we will be able to determine what municipal services an incorporated Town or City of Big Sky might provide and the best means for delivering them. (Currently, Big Sky's population is approximately 2,300. Under Montana law 4, classes of municipality are recognized and those with a population of between 1,000 and 2,500 can be classified as either a third-class city or town.)

This initial municipal services plan will allow us to develop a methodology for estimating the service demand, best operational configuration, and unit costs. We will develop an approach that allows us to scale services for the community on a defensible basis.

Potential approaches would include per capita scaling or an approach based on land uses. We will have a recommended approach for estimating the level and cost to deliver a comparable level of municipal services to the Big Sky community that accurately reflects what is found in surrounding comparable incorporated areas. We plan to carefully tie our recommendations to observable programs in other jurisdictions and to develop a fiscal estimate to show costs by program in a manner scalable to the population served and other relevant factors. We have been preparing detailed fiscal models for cities throughout the western United States, including several resort areas, for many years and can draw on this knowledge, both to create the estimate and to doublecheck our expenditure assumptions.

We will prepare a draft memorandum that summarizes our analysis and draft municipal services plan and review it with project leaders. After receiving feedback, we will produce a screen check and final version.

***Deliverable:*** *Municipal services plan with analysis and preliminary recommendations*

***Schedule:*** *Weeks 7 through 10*

### **Activity 5 — Gather financial information and estimate municipal revenues and expenditures**

Special districts are often precursors to incorporated cities. Sometimes they are consolidated into a new city and sometimes they continue to function independently. It is likely in this case that the current Big Sky Resort Area District would be folded into the new city or town and be dissolved. The other special districts for fire, water and sewer and the hospital may or may not be absorbed by a new city depending on the desires of their elected boards and their existing financial conditions. In this activity we would develop a long range 5–10-year fiscal model to help us understand how the new incorporated city would be structured and how it would financially function for a longer period of time.

We will initiate a learning phase to understand the District's current fiscal status and environment and potential impacts of incorporation on both the District and the agencies that currently provide services to the area (such as the Big Sky Fire Department, the Big Sky Water and Sewer District, the Big Sky Trails Recreation and Parks District and the Madison County Hospital District). We will conduct interviews to learn about systems and reports that are used in administering the District's budget and finances. We will also review multi-year budget information for the District, including such items as historical revenue sources and amounts, expenditure allocations, reserves and other funds, budgetary reductions and cost shifts that have been made to date and other relevant factors. We will review the FY 2023-24 Annual Operating Budget prepared by the District and approved by the District Board.

We will also inspect and learn about the costs and revenues associated with several other local service providers serving the District area, including:

- Big Sky Fire Department (a special district that levies its own taxes and receives funding from the District) and Big Sky Water and Sewer District (a special district which also receives funding from the District)
- The Big Sky Trails Recreation and Parks District (a special district which receives funding from the District for asset maintenance)
- Gallatin and Madison County Sheriff operations within Big Sky (some funding is provided for dispatch services to the Gallatin County Sheriff from the District)
- Other Gallatin and Madison County operations within Big Sky

We will also gather data from up to four peer jurisdictions, which will be useful to review costs and practices. We will identify criteria for choosing comparable jurisdictions, discuss this with the District project team and gather information from publicly available sources, such as websites and budget documents. We will work with the County of Gallatin and Madison to gather information on tax revenues collected within District boundaries. All this information will be used in the next activity as we develop an initial five-year budget for the hypothetical incorporated city.

***Deliverable:*** Revenue estimates and possible tax mitigation approaches

***Schedule:*** Weeks 11 through 14

### **Activity 6 — Develop a five-year budget model and plan**

As we begin this work, we will have categories and estimates for municipal revenues and expenditures. After obtaining the necessary information during Activity 4, we will prepare a fiscal model that will include a five-year budget plan to assist the potential incorporated town or city of Big Sky to meet future budget needs. We will create a fiscal model dashboard as a display and a “what-if” analysis tool using the five-year forecast to analyze impacts of changes in assumptions for key revenue and expenditure categories. This dashboard will also include a section that allows staff to incorporate budget strategy changes such as revenue enhancements, and to vary workload and service levels for various types of municipal services. We will discuss the results of the forecast with District staff and board members to solicit feedback and determine if additional analysis or information is required to finalize the budget plan.

***Deliverable:*** Draft and final five-year budget plan

***Schedule:*** Weeks 15 through 18

### **Activity 7 — Develop preliminary comprehensive fiscal analysis (draft and final)**

After reviewing the municipal services plan, the five-year budget model and plan, and the agency impacts analysis with project officials, including the Working Group, we will prepare a written report in draft form. The report will include analysis of the following:

- Introductions and conclusions
  - History of incorporation discussions
  - Current services
  - Methodology of PCFA
  - Boundary options
  - Feasibility of incorporation
  - Fiscal impacts on other agencies
  - Alternatives

- Description of incorporation proposal
  - Name of the new city
  - Form of government
  - Reorganization proposal
  - Service levels
  - Taxes and revenues
  - Capital improvements
- Public services plan and cost assumptions
  - City administration
  - Police protection
  - Public works/engineering
  - Planning, community development, building and code enforcement
  - Parks and recreation
  - Library
  - Animal control
  - Parks, recreation and open space
  - Solid waste
  - Regional participation
  - Other city expenditures (including the services currently provided by other special districts water, wastewater and fire EMS services)
- Municipal revenue estimates
  - Growth and development
  - Revenue assumptions
  - Sensitivity analysis
- Impacts on existing agencies

Baker Tilly will provide the draft report for review by the project team. At the conclusion of the review period, we will consider all changes and suggested revisions and prepare the final report.

Because we recognize that it will be critical to gain the support of other affected local governments such as the counties and the local special districts, we will work with the leadership of the District to develop options that will be mutually beneficial to the community and the other local governments. These options could include options to develop and share new revenue sources and/or to reduce current expenditures or potential liabilities.

Reports prepared by Baker Tilly are rich in detail, with recommendations supported by quality analysis. We take pains to ensure that our analysis and subsequent recommendations are organized in an easy-to-understand format and presented in a positive manner. We take several discrete steps to ensure quality control. The first is to prepare a draft report for managers to review to ensure that facts are accurate and ideas are presented clearly. Baker Tilly retains responsibility for our professional recommendations, but we expect that vetting the draft report with management improves its utility. In addition to vetting the report for accuracy, the draft review provides an opportunity to discuss the recommendations and to identify implementation issues. Baker Tilly is committed to recommending actions that result in meaningful operational improvements and can be implemented in the real world. After comments have been received, the final project report will be prepared, peer-reviewed and then transmitted to you.



# Experience and availability of project team

*Big Sky Resort Area District will work with a consistent team of Value Architects™ who understand your organization and can add value from day one. The combination of your engagement team's public sector experience and service knowledge translates into tangible results for Big Sky Resort Area District.*

## Aligning key engagement team members with your goals

Your handpicked team of professionals offers a collaborative focus supported by the breadth and depth of our firm's national resources. We believe in strong personal relationships, and this means a personal interest in Big Sky Resort Area District from some of our most experienced team members. Engagement team members are introduced below, and complete resumes are available in **Appendix A**.

### INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR THE DISTRICT

#### Andrew Belknap — Project manager



Andy has more than 20 years of local government experience, including service as a city manager, public works director, a variety of interim management positions and as a consultant to California municipalities and special districts. He specializes in local government financial management and has led numerous projects to address structural fiscal deficits. Andy has served well over 200 California and Nevada local governments, many on multiple occasions, including 19 of the largest 20 cities.

During 2008 and 2009, Andy served as an expert witness in the City of Vallejo's bankruptcy proceeding. In 2011 and 2014 he served as project manager for the City of Stockton's AB 56 process mediation and subsequent Chapter 9 bankruptcy and recovery. Between 2015 and 2017 he managed the City of San Bernardino's bankruptcy and developed the plan of adjustment for the City, which led to fundamental changes in governance and operations. As a result of bankruptcy recovery and other work, he is expert at identifying alternative service delivery arrangements, as well as developing revenues over a broad array of municipal services.

A trained economist, Andy brings a special expertise to fiscal analysis and public finance issues. His blend of quantitative skills, coupled with a practitioner's understanding of public services and management systems, adds value to all types of organizational and policy analysis.

## EXPERIENCE AND AVAILABILITY OF PROJECT TEAM

### INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR THE DISTRICT



#### **Marta Purdy, AICP — Urban planning subject matter specialist**

Marta joined Baker Tilly in 2021 and has more than 15 years of experience in managing public-private partnerships (P3) towards investing in catalytic community development projects. Marta works with P3 teams to establish investment team partners and structures, set clear and shared visions, develop and execute complex financial and financing strategies, and manage design and approval processes. Before joining Baker Tilly, Marta worked at Vandewalle & Associates, a boutique urban planning and economic development consulting firm for 12 years. She holds a Master of City and Regional Planning from the University of North Carolina at Chapel Hill and a Bachelor of Arts, Geography, Certificate from the Nelson Institute of Environmental Studies University of Wisconsin-Madison. Marta is also a member of the American Institute of Certified Planners (AICP) and American Planning Association (APA).



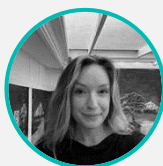
#### **Matthew Stark — Analytics subject matter specialist**

Matt is a manager with Baker Tilly's municipal advisory team. With the firm since 2002, he applies his analytical expertise to new challenges within the fields of community surveys, operational finance and economic development. He provides technical assistance on community surveys and has developed a variety of tools for financial planning and cost-benefit analysis of tax incentives on economic development projects. Since 2015, Matt has served as the primary analytical resource for Baker Tilly's scientific survey group, applying his talents to survey structure and language, methodology, analysis and presentation of responses. Matt holds a degree in Physics from Penn State University.



#### **Kristian Vaughn, EDP, ENV SP — Economic development subject matter specialist**

Kristian is an experienced and well-connected economic development strategist, urban science researcher and project manager with 10 years of experience in community economics, land use management and public policy in the governmental, private consulting and non-profit sectors. Specialties include financial structuring of complex, multi-million-dollar transactions, supporting municipal staff in the development and implementation of economic strategies to catalyze reinvestment in commercial corridors, and assessing neighborhood economic performance, local market changes and public policy impacts through the development of data dashboards, 2D mapping and digital twins.



#### **Sydni Pierce — Economic development subject matter specialist**

Sydni joined Baker Tilly in 2023 as a senior consultant and has previously worked on economic development projects. She has more than five years of experience in public sector consulting at the state and federal levels, during which time she has participated in federal grant writing and management, economic development, organizational redesign for non-profits and federal agencies and policy analysis engagements. She previously worked in a property management role specializing in U.S. HUD Community Development Block Grant (CDBG) compliance at a community development corporation that managed nearly 50 housing units as well as a community center. She was an economic development finance specialist at the governor's office in Texas, where she led the designation of Opportunity Zones in the state via both quantitative and qualitative processes that incorporated the priorities of local stakeholders across the state. She is a member of the Urban Land Institute Indiana district council.

#### **BIG SKY RESORT AREA DISTRICT WILL RECEIVE TANGIBLE RESULTS WITH BAKER TILLY**

*All engagement team members are committed to the District's success. Their industry experience and service expertise translate into tangible results for the District.*

### Drawing upon our broad array of municipal government experts


In addition to our experienced engagement team, we are able to draw upon the deep wealth of expertise provided by our personnel with extensive prior careers in municipal government, serving as special advisors on select topics. This is a strategic talent differentiator for Baker Tilly and a valuable asset to our public sector clients. Below, we included a table demonstrating the breadth of expertise among our municipal government experts.

SPECIAL ADVISORS	Parks and Recreation	Community engagement	Legal	Human Resources	Public Works	Planning and Building
Donna Peter				•		
Craig Bronzan	•					
Don White					•	
Magda Gonzales		•				
Shauna Clark		•				
Steve Mermell			•			•
Susan Healy Keene, AICP						•
Timm Borden, P.E.					•	
Reina Schwartz			•	•		

### Completing Big Sky Resort Area District's project on time and on budget


The District will be a valued client, and we have the ability to complete your project on time and within budget. We use ProStaff, a dynamic scheduling tool, to make sure our team members have availability and your project is properly staffed. The key team members identified in this proposal will perform the District's exploration study work and meet your requested deadlines.

To make sure we meet your objectives and help our team members manage their workloads, our firm uses the scheduling and planning strategies highlighted below.




**Dedicated teams with clearly defined roles and responsibilities**

We structure our responsive team to quickly escalate any issues, be available when you need us and meet your needs without overburdening individual team members.



**Staff scheduling tools and resources to deliver high-quality service**

Our team members enter their availability into ProStaff. Resource management coordinators use weekly reports to make sure team members' commitments do not exceed their capacity to deliver high-quality service.



**Flexible staffing ratios and a high level of partner and manager resources**

We offer flexible staffing ratios depending on project needs. We balance workloads for team members through advanced planning and integrate additional subject-matter specialists and support staff when needed.

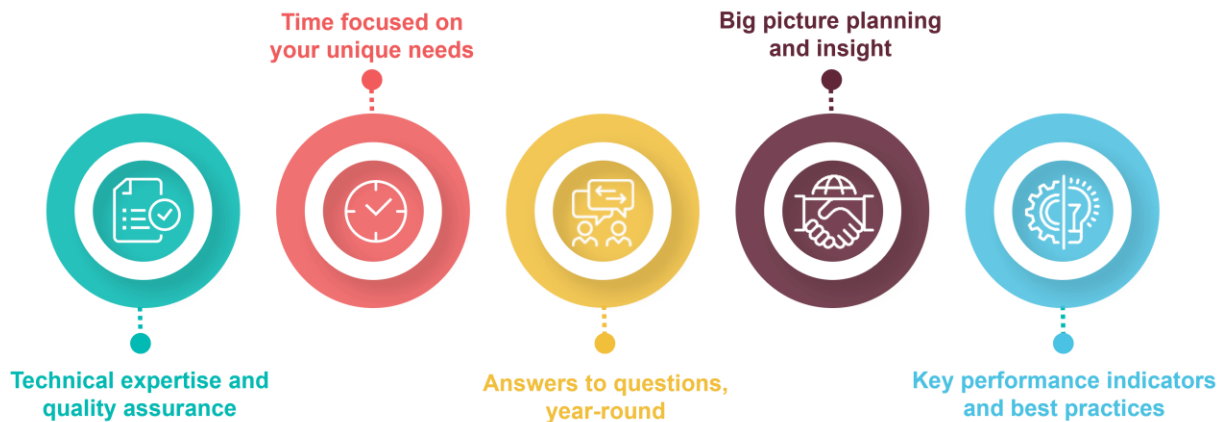
#### MEETING YOUR DEADLINES AND NEEDS THROUGH AN ORGANIZED SCHEDULING PROCESS

*We match available team members who can provide quality service and have the experience required for a particular project.*

### Building trust and maximizing value with significant team member involvement

Your experienced engagement team members will be responsive to your needs, quickly resolve challenges and build trust. You can expect to receive technical insights and an approach customized to your unique structure, culture, timing and strategic goals.

We are ready to serve you when you need us, where you need us and for as long as you need us. Whether it is an early-morning phone call or late-night email, we are here to give you peace of mind when it comes to financial reporting. The graphic below details how we will build trust and maximize value with Big Sky Resort Area District.



#### COLLABORATING WITH YOU AS YOUR TRUSTED VALUE ARCHITECT™

*Your partners and managers will be deeply involved in the engagement to give them an in-depth working knowledge of your organization and processes to deliver value throughout the year.*

# References

*We are always happy to provide references because it is important for you to talk with the organizations we serve. Our similar client base equals experience-derived insights for Big Sky Resort Area District.*

## Demonstrating successful relationships with similar clients

We encourage you to connect with the clients below to learn more about the value of their relationship with Baker Tilly. Each client will offer a different perspective as you consider your own needs.

CITY OF BILLINGS, MONTANA			
<b>Name</b>	Andy Zoeller	<b>Title</b>	Finance Director
<b>Phone</b>	+1 (406) 657 8209	<b>Email</b>	<a href="mailto:zoellera@billingsmt.gov">zoellera@billingsmt.gov</a>
<b>Services</b>	Debt planning and issuance, continuing disclosure, arbitrage/rebate, capital planning		

CAMBRIA COMMUNITY SERVICES DISTRICT, CALIFORNIA			
<b>Name</b>	Tammy Rudock	<b>Title</b>	Former General Manager
<b>Phone</b>	+1 (650) 591 8941	<b>Email</b>	<a href="mailto:tammyr@midpeninsulawater.org">tammyr@midpeninsulawater.org</a>
<b>Services</b>	Baker Tilly was retained by the Cambria Community Services District to develop a PCFA which analyzed whether the statutory revenues for a city based on the Cambria Community Services District boundaries would be sufficient to cover the costs of the municipal services which would be assumed by the new city. This analysis shows that the current municipal revenues generated in Cambria are sufficient to fund the operations of a city. Specifically annual revenues are estimated at approximately \$6.1 million with expenditures of approximately \$6.0 million. Our report noted that the preliminary revenue and expenditure estimates that will need considerable refinement if the District elects to initiate the process for incorporation, and new information may lead to the adjustment of these estimates. However, our analysis found that incorporation would be feasible. Our analysis also determined that, should the community incorporate, the Cambria Community Services District (CCSD) would dissolve and the functions of the district would be absorbed by the new city. The major new functions that a city would deliver are land use planning, building regulation, street maintenance, police protection and full parks and recreation services. Those services combined with the services currently provided by CCSD (fire protection, water, wastewater, trash collection and some parks functions) would consolidate most of the traditional municipal or city service functions under the direction of a city council which has been elected by voters and operates under a council/manager system of government.		



## CITY OF SAN LUIS OBISPO, CALIFORNIA

<b>Name</b>	Shelly Stanwyck	<b>Title</b>	Assistant City Manager
<b>Phone</b>	+1 (805) 781 7294	<b>Email</b>	<a href="mailto:sstanwyc@slocity.org">sstanwyc@slocity.org</a>
<b>Services</b>	Our consultants performed an assessment of the City's Capital Improvement Program (CIP) process. The analysis included reviewing their staffing complement as well as the organization structure of their CIP Engineering Division. The focus of the engagement was to improve the delivery of capital projects, with an emphasis on delivering them on time and on budget. Our analysis included recommendations to introduce additional performance measures to the process, expand scoping of projects, reclassify some of the existing positions and create new job classifications.		

## SAN BERNARDINO COUNTY, CALIFORNIA

<b>Name</b>	Andrea Miller	<b>Title</b>	Former City Manager
<b>Phone</b>	+1 (562) 587 9314	<b>Email</b>	<a href="mailto:atravis@earthlink.net">atravis@earthlink.net</a>
<b>Services</b>	Baker Tilly was retained by San Bernardino in 2015 to lead bankruptcy recovery efforts after a court gave the city a deadline to file a Plan of Adjustment. (The city had been in bankruptcy since August 2012.) We led the effort to create the plan and submitted it to the court by the deadline. Two of the larger elements of the plan included the franchising of solid waste services and annexation to the County Fire Protection District to reduce costs and generate additional revenue. The fire annexation was processed through San Bernardino LAFCO in an effort led by Baker Tilly. The annexation was effective July 1, 2016. The net gain to the city's general fund is estimated at \$10.5 million annually. The solid waste franchise was awarded to a private company in April 2016 and resulted in additional annual revenues of approximately \$3 million and one-time revenues of over \$5 million. In both service delivery changes all existing employees wishing to retain their positions were offered employment by the new service providers.		

## SANTA CLARA COUNTY, CALIFORNIA

<b>Name</b>	Neelima Palacherla	<b>Title</b>	Executive Director
<b>Phone</b>	+1 (408) 299 5127	<b>Email</b>	<a href="mailto:neelima.palacherla@ceo.sccgov.org">neelima.palacherla@ceo.sccgov.org</a>
<b>Services</b>	This project required Baker Tilly to prepare a Cities Services Review report required of LAFCO under the Cortese-Knox-Hertzberg Act of 2000, to obtain information about service delivery, evaluate the provision of services, assess current practices and explore future opportunities for collaboration among cities and other local agencies for the 15 municipalities within Santa Clara County. Services reviewed included: animal control, law enforcement, library, lighting, parks and recreation, planning/building, solid waste, stormwater, utilities (electricity, gas) and wastewater collection and treatment. The report also included two special focus areas: shared services; and, sprawl preventions and infill development and agricultural land preservation.		

## PROVIDING VALUABLE PERSPECTIVES FROM CURRENT CLIENTS

*At Baker Tilly, relationships matter. Our team has a record of successfully enhancing and protecting similar clients' goals — resulting in experience-based insights for Big Sky Resort Area District.*

# Cost

*Value means more than simply checking boxes and meeting your requirements. Value means services that lead to meaningful insights, help improve efficiencies and direct more dollars and resources to achieving Big Sky Resort Area District's objectives.*

## Delivering a professional fee estimate for Big Sky Resort Area District

We have prepared a service fee and expenses estimate for the District based on the needs and objectives you have shared and our experience conducting similar engagements with public sector clients. Travel and expenses will be charged at cost with no mark-up. Our estimate allows for thorough and insightful advice and services from experienced professionals without unnecessary add-ons or start-up charges and accommodate occasional technical questions. The District will receive service from dedicated, experienced staff who work with you toward your goals, providing a high value for fees.

Your project manager will work with the District to modify the scope to fit the budget as needed, communicate any anticipated budget impacts to work with the District's monetary constraints, and proactively communicate budget changes for out-of-scope service requests. Baker Tilly can revise the proposed budget to a not-to-exceed structure upon request.

Please refer to the table below for a breakdown of project phases and estimated associated costs.

SERVICES	FEES*
Activity 1 — Start project	\$5,500
Activity 2 — Gather information for plan	\$17,700
Activity 3 — Public outreach	\$24,500
Activity 4 — Draft municipal service plan	\$15,900
Activity 5 — Financial information and estimate	\$12,800
Activity 6 — Develop budget	\$14,900
Activity 7 — Draft and final analysis	\$22,900
<b>TOTAL FOR ALL SERVICES</b>	<b>\$114,200</b>

### VALUE FOR FEES PAID

*Big Sky Resort Area District can expect exceptional service paired with a fair, competitive fee arrangement that allows us to deliver continuous value throughout our relationship.*

## Avoiding surprises and a nickel-and-dime billing approach

Routine phone calls, emails and quick consultations are included in the District's fee estimate. We do not believe in billing for every question, comment or concern, and we encourage you to discuss any unusual transactions with us to gain efficiencies for year-end.

If an issue arises, your engagement team members will work with you to determine the level of assistance required and arrange an appropriate fee at that time. We will **always** tell you if the assistance you need is out of scope, and we **never** perform additional work without approval.

### Detailing our assumptions

We based our project scopes and fee estimates on the assumptions detailed below. Should any of these change during the engagement, we will bring the matter to the District's attention immediately and prepare a change order detailing the new requirements and corresponding budget impact. We will not undertake additional work without the District's written approval. Assumptions include:

- The District's senior management is fully committed to the success of this project
- The District will designate and assign a dedicated project manager, who will be responsible for coordinating activities with Baker Tilly and District personnel, as needed, throughout the project
- Adequate support, preparedness and cooperation from management
- Team members are available at scheduled times, and significant changes to the project schedule are avoided
- Requested information is provided in a timely manner, in preferred formats
- No significant changes in scope from that outlined in this proposal
- If selected, Baker Tilly will be afforded an opportunity to propose additional terms and negotiate mutually agreeable contract terms and conditions including, but not limited to matters related to indemnification, ownership of work product and the incorporation of exhibits
- The District recognizes that the services provided are advisory in nature only and that the District will assume responsibility for implementation decisions
- Adherence to project timelines is dependent upon the availability of client personnel to participate in interviews, focus groups, deliverable reviews, etc.

### Providing our standard hourly rates

When nonroutine matters arise outside the scope of the engagement, we will base our fees on our standard rates. When possible, we will provide an estimate in advance of the time and expense we believe necessary to achieve your objectives. Final billings are always evaluated in light of value delivered. Our standard hourly rates are located below.

STANDARD HOURLY RATES	
STAFF LEVEL	HOURLY RATES
Partner/director	\$550
Senior manager	\$370
Manager	\$290
Senior	\$240
Staff	\$190

#### BAKER TILLY'S STANDARD HOURLY RATES

*We will base additional services on our standard hourly rates. We will always tell you if the assistance you need is out of scope and never perform additional work without approval.*

Supporting you with our value-for-fees approach

We will provide the highest quality service for a fair and reasonable fee. Below is an overview of our value-for-fees approach and how it benefits you.

 <p>A team that works with a similar client base and is ready to lead a smooth and beneficial transition</p>	 <p>Frequent check-ins and timely responses to your inquiries</p>	 <p>Controlled costs through a service approach designed for your organization; no surprise billing or add-on charges</p>	 <p>Knowledge retention through a commitment to staff continuity</p>	 <p>Proactive ideas and industry insight shared year-round via complimentary articles, toolkits, webinars, e-books, alerts, whitepapers and newsletters</p>
 <p>Support from the full breadth and depth of Baker Tilly's resources across the U.S. and around the world</p>	 <p>Practical, flexible and collaborative approach designed for your unique needs</p>	 <p>Full range of service solutions to grow with your needs</p>	 <p>Use of innovative technology and software tools to support real-time communication, efficiencies and compliance</p>	 <p>High level of experienced partner and manager involvement for a big-picture perspective</p>

COMMITMENT TO VALUE FOR FEES

*Big Sky Resort Area District can expect exceptional service paired with a fair, competitive fee arrangement that allows us to deliver continuous value throughout our relationship.*

# Appendix A: Resumes



## MANAGING DIRECTOR

# Andrew Belknap

*Andy Belknap is a managing director with Baker Tilly's public sector advisory practice.*



### **Baker Tilly US, LLP**

205 N Michigan Ave  
28<sup>th</sup> Floor  
Chicago, IL 60601  
United States

T: +1 (408) 437 5400  
[andy.belknap@bakertilly.com](mailto:andy.belknap@bakertilly.com)

**[bakertilly.com](http://bakertilly.com)**

## Education

Master's degree in economics,  
with a specialty in public finance.  
Bachelor's degree in  
math/economics  
University of California, Santa  
Barbara

Andy has more than 20 years of local government experience, including service as a city manager, public works director and consultant to California municipalities, counties and special districts. His areas of expertise include fiscal and budget analysis, municipal restructuring, governance models and developing service delivery partnerships and functional consolidations to take advantage of economies of scale in public sector service delivery. Andy has served more than 100 California local governments, many on multiple occasions, including 17 of the largest 20 cities.

A trained economist, Andy brings special experience to fiscal analysis and public finance issues. His blend of quantitative skills, coupled with a practitioner's understanding of public services and management systems, adds value to all types of organizational and policy analysis.

## Specific experience

- Led numerous projects to address structural fiscal deficits in diverse settings including the cities of San Jose, Fremont, Santa Ana, Santa Cruz, Bakersfield, Sacramento and Tracy, California as well as the Ports of Oakland and West Sacramento
- Served as an expert witness in the City of Vallejo's bankruptcy proceeding
- Served as project manager for the City of Stockton's AB 56 process mediation and subsequent chapter 9 bankruptcy and recovery
- Managed the City of San Bernardino's bankruptcy and developed a plan of adjustment for the city, which led to fundamental changes in governance and operations
- Develops alternative service delivery arrangements over a broad array of municipal services including law enforcement, fire, EMS, code enforcement, public works, parks and recreation and community development
- Served more than 200 California and Nevada local governments
- Helped develop a tool for modeling "revenue loss" and other eligible funding uses, as specified in the American Rescue Plan (ARPA) legislation and Treasury rules

**DIRECTOR**

# Marta Purdy, AICP

*Marta Purdy is a director with Baker Tilly's public sector advisory practice.*

**Baker Tilly US, LLP**

4807 Innovate Lane  
Madison, WI 53707  
United States

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[marta.purdy@bakertilly.com](mailto:marta.purdy@bakertilly.com)

[bakertilly.com](http://bakertilly.com)

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**Education**

Master of City and Regional  
Planning  
University of North Carolina at  
Chapel Hill

Bachelor of Arts in geography  
University of Wisconsin – Madison

Marta joined Baker Tilly in 2021 and has more than 15 years of experience in urban redevelopment, project management and execution of public private partnership (P3) projects. Marta is a strategic thinker who leverages creative insights to achieve economic and social impacts. She works with P3 teams to establish investment team partners and structures, set clear and shared visions, develop complex financing strategies and manage project execution across interdisciplinary teams. Before joining Baker Tilly, Marta worked at a boutique urban planning and economic development consulting firm for 12 years working throughout the Midwest.

**Specific experience**

- Served as planning and economic development consultant for community development, economic development, market assessment, redevelopment, targeted area and citywide planning initiatives for communities including Louisville, Kentucky; Shreveport, Louisiana; Palo Alto, California; Moline, Illinois; Waterloo, Iowa; Rifle, Colorado; Elkhart, Indiana; San Antonio, Texas
- Work closely with public and private sector leaders, including Fortune 500 companies and P3 entities to advance growth and development through effective relationship management, problem solving and interpersonal abilities
- Perform financial analysis of economic development strategies and development initiatives to optimize available project financing options
- Advises on complex project implementation strategies focused on advancing client growth initiatives, often engaging public-private partnerships including corporate and not-for-profit organizations
- Develops strategies, concepts, budgets and implementation plans for place-based and/or industry-led economic development initiatives such as advanced manufacturing, aerospace and sports/entertainment

**Industry involvement**

- American Institute of Certified Planners (AICP)
- American Planning Association (APA) National and Wisconsin Chapters

## MANAGER



# Matthew Stark

*Matt Stark, a manager at Baker Tilly, has more than 16 years of experience.*



## Baker Tilly US, LLP

30 E Seventh St  
Suite 3025  
St. Paul, MN 55101  
United States

T: +1 (651) 223 3043  
[matt.stark@bakertilly.com](mailto:matt.stark@bakertilly.com)

[bakertilly.com](http://bakertilly.com)

## Education

Bachelor of Science in physics  
Pennsylvania State University

Matt's primary responsibilities are the design and implementation of scientific, random-sample and online surveys. These surveys help elected officials and professional staff to understand the perceptions, opinions and motivations of their communities providing feedback from residents who would not otherwise make their voices heard. These surveys help inform decisions about spending priorities and long-term planning. In addition to his survey work, Matt assists several Baker Tilly practice groups with his analytical prowess helping find solutions for new challenges within the fields of operational finance, economic development and compensation studies.

## Specific experience

- Designs and conducts random-sample telephone and online surveys for school districts, cities and counties
- Develops analytical tools for Baker Tilly practice groups in operational finance, capital planning, economic development, employee compensation and transportation planning

## Industry involvement

- American Association for Public Opinion Research (AAPOR)

## MANAGER

# Kristian Vaughn, EDFP, ENV SP

*Kristian is a manager with Baker Tilly's public sector advisory practice.*



## Baker Tilly US, LLP

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Suite, 2000  
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United States

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[kristian.vaughn@bakertilly.com](mailto:kristian.vaughn@bakertilly.com)

[bakertilly.com](https://bakertilly.com)

## Education

Doctor of Philosophy in  
architecture  
Master's degree in urban planning  
Bachelor's degree in history and  
Spanish  
University of Wisconsin –  
Milwaukee

Kristian is an experienced and well-connected economic development strategist, urban science researcher and project manager with 10 years of experience in community economics, land use management and public policy in the governmental, private consulting and not-for-profit sectors.

Specialties include financial structuring of complex, multimillion dollar transactions, supporting municipal staff in the development and implementation of economic strategies to catalyze reinvestment in commercial corridors, and assessing neighborhood economic performance, local market changes, and public policy impacts through the development of data dashboards, 2D mapping and digital twins.

## Specific experience

- Responsible for deal origination, client relationship management and project contracting for Wisconsin's Business Development Tax Credit (BTC) program in southeastern Wisconsin. Served as the manager for deals from initial concept to application, underwriting, contract execution and servicing. Coordinated client management with regional and county economic development organizations (EDOs) to structure transactions with multiple financing sources, including tax credits, loans, tax increment finance and grants
- Conducted economic development analyses to support comprehensive and master planning, strategic planning for business improvement districts and revitalization schemes for dormant marketplaces

## Continuing professional education

- Economic Development Finance Professional (EDFP)
- Envision Sustainability Professional (ENV SP)

## Awards and recognition

- Graduate of the Last Decade (GOLD) Award
- American Institute of Certified Planners (AICP) Outstanding Student Award

## SENIOR CONSULTANT

# Sydni Pierce

*Sydni is a senior consultant with Baker Tilly. She joined the firm in 2023.*



### **Baker Tilly US, LLP**

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**[bakertilly.com](https://bakertilly.com)**

## Education

Master of Public Affairs,  
concentration in public financial  
administration, policy analysis  
Indiana University Bloomington

Bachelor of Arts in sociology,  
economics  
Indiana University-Purdue  
University Indianapolis

Sydni is a senior consultant in Baker Tilly's public sector advisory practice with more than five years of experience in public sector consulting at the state and federal levels. She has participated in federal grant writing, economic development, organizational redesign for not-for-profits and federal agencies and policy analysis engagements. She is also experienced in economic development and incentive programs, with direct, state-level experience in incentive management and working with federal programs. She is particularly skilled in public finance and data analytics holding certificates in analytics and ArcGIS.

## Specific experience

- Consulted on barriers and opportunities for innovation-spurred economic development in New York involving stakeholder interviews, analysis of federal data sources and development of recommendations.
- Managed engineering and economic data in PowerBI and authored proposal sections for a regional hydrogen hub funding application to the Department of Energy.
- Recommended changes to back-office operations for a utility sector not-for-profit based on stakeholder interviews and document reviews.
- Led the designation of 628 Opportunity Zone tracts in the state of Texas. Designed an Excel model based on economic, demographic and social indicators as well as incorporated development priorities solicited from state and local officials.
- Managed an asset-backed small business loan program including performing application review, financial analysis and marketing/outreach and managed a commercial paper program.
- Co led a project to bring single-family homes, duplexes and an apartment complex into compliance with Community Development Block Grant (CDBG) regulations. Conducted outreach to and led meetings with residents.



# Appendix B: License



## CERTIFICATE OF AUTHORIZATION

I, **CHRISTI JACOBSEN**, Secretary of State for the State of Montana, do hereby certify that on **August 18, 2022**, this office issued a Certificate of Authority to:

### **Baker Tilly US, LLP**

A foreign limited liability partnership organized under the laws of the State or Province of **Illinois**, which expires on **August 18, 2027**, to transact business and conduct affairs in the State of Montana.

Payment is reflected in the records of the Secretary of State for all fees owed to the Secretary of State.

No certificate of withdrawal or revocation has been placed on the record in this office by said limited liability partnership and the records indicate the limited liability partnership is in good standing under the laws of the State of Montana.

The Secretary of State cannot certify that tax and penalties owed to this state on record with the Department of Revenue are current. Please contact the Department of Revenue at (406) 444-6900 to obtain information on the tax status.



IN WITNESS WHEREOF, I have hereunto set my hand and affixed the Great Seal of the State of Montana, at Helena, the Capital, this 18th day of August, 2022

**Christi Jacobsen**  
Montana Secretary of State  
Certificate Number: 29753130