



**Treasure State**  
strategies



SERVICES PROPOSAL FOR:

# Big Sky Incorporation Study

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# Exhibit 'B'

Acknowledge Addendums

1. N/A

Total contract price: \$1,022,000.00

Acknowledge terms and conditions of contract:

Yes

## **AGREEMENT TO TERMS & CONDITIONS**

THE UNDERSIGNED IS DULY AUTHORIZED TO BIND THE COMPANY NAMED BELOW AND HEREBY AGREES TO ALL THE TERMS AND CONDITIONS IN THE FOREGOING REQUEST FOR PROPOSALS

Treasure State Strategies

Company Name



Signature

April 12, 2024

Date

# Cover Letter

Treasure State Strategies  
PO Box 7342  
Helena, MT 59601

April 12, 2024

**Daniel Bierschwale**, *Executive Director*  
Big Sky Resort Area District  
PO Box 160661  
11 Lone Peak Drive, Suite 204  
Big Sky, MT 59716

Dear Mr. Bierschwale,

Treasure State Strategies is a Montana based consulting firm that is built on the key tenets of working hard, building relationships, and getting results with respect and trust. We have compiled a team with decades of combined expertise in local government policy and unparalleled institutional knowledge of the State of Montana. We are proud to present the following proposal to conduct an impartial and fact-based incorporation study for the Big Sky Resort Area District (BSRAD).

Transparency, local knowledge, and open communications are the core principles that have guided our approach to delivering a thoughtful and unconstrained proposal for an incorporation exploration study. The purpose of this study is to inform, educate, and empower the residents of Big Sky in making decisions about their local governance options. Our commitment to transparency means that we will provide clear and comprehensive information at every stage of the process, ensuring that stakeholders are well-informed and engaged throughout.

We have recruited a team consisting of subject matter experts in Montana law, public policy, economics, and communications. In addition to these areas of expertise, our team also has specific experience working with the resort communities in the American West. We are excited at the prospect of working on this issue, unique to Big Sky and our State. Together, we bring a shared understanding of the local dynamics, challenges, and opportunities our rural and developing communities face. We know Montana, and are dedicated to leveraging our experience and skill to deliver a successful and actionable study addressing the specific needs and priorities of the Big Sky region.

Thank you for considering our proposal. We look forward to the opportunity to collaborate with the BSRAD on this impactful project.

Sincerely,



**Kali Wicks**, *President & Founder*  
Treasure State Strategies  
kali@treasurestatestrategies.com  
406-459-6384

# Proposal

Treasure State Strategies (TSS) will serve as the central hub for project management services throughout the Incorporation Exploration Study for the Big Sky Resort Area District (BSRAD). Our team will oversee the coordination and execution of all project-related activities, ensuring seamless communication and collaboration among stakeholders. Kali Wicks and Erin Bills will serve as the key contacts for BSRAD, providing relevant communication on a timely basis to keep the group apprised of project progress, milestones, and any emerging issues for discussion. We will manage team calendars and conduct regular meetings to ensure alignment on project goals, tasks and timelines.

With a focus on meticulous planning and strategic direction, TSS will facilitate the implementation of key benchmarks, timelines, and deliverables outlined in the project scope. Additionally, our expertise in Montana's local government policy, resort communities, municipal structure, finance, rural nature and regulatory matters will provide invaluable guidance, ensuring the exploration and analysis of all scenarios, relevant statutes and regulations governing the incorporation process. TSS will utilize the expertise of our team, along with our vendor partners, to deliver a factual, impartial, and actionable study for the citizens of Big Sky. All team members will generally be available from 9 a.m. to 5 p.m. on business days.

## **UNDERSTANDING OF NEED**

The community of Big Sky is considering incorporation. The incorporation decision raises two main questions. First, what are the options for incorporation? Second, what are the tradeoffs associated with the different options, including the option to preserve the status quo? This study aims to help the community gain an understanding of the answers to these questions.

Treasure State Strategies understands that the purpose of an impartial and factual Incorporation Exploration Study is not to promote or deter from incorporating the community of Big Sky, but to inform, educate, and empower residents of this Census-designated Place (CDP) as to the current options available to incorporate under existing Montana law, along with the political and economic factors that should be considered during the incorporation process. The final study will provide Big Sky residents with a broad understanding of the potential for governance options in Montana and the tradeoffs associated with each to aid decision-makers as the community moves forward in their determination process.

Specifically, the study will analyze the incorporation options and their impacts both within and outside the proposed municipality's boundaries based on varying incorporation maps of Big Sky. Team members have reviewed prior efforts to incorporate, existing Montana law, and the "Governance and Community Engagement Report" published in September of 2023 to the BSRAD website. Based on this preliminary review, the tradeoffs associated with incorporation stem from how each option changes governance models and/or how each option aligns with the needs of the community.

As each option for incorporation presents a different set of variables for governance, one can think of these potential changes as an adjustment to the "control panel" for a governing area. Depending on the particular governance structure or model explored, the legal powers and requirements triggered by incorporation may change. For example, some options may allow for the availability of certain resources such as allowing the area to pursue grants only available to municipalities. In exploring all options, we will provide information as to how each potential decision may impact the community and present the feasibility of each.

Each option for a potential governance structure may also change who or what body is "in charge" at the controls. Our study will outline how each potential governance model would impact the decision making process along with how these options would impact the area. We will also include an overview of similarly situated Montana communities and the challenges, opportunities, and lessons learned from their choice of government model. This will assist the area in understanding the motivations behind why different communities



have chosen certain types of governance models and related powers. For example, some communities may be motivated by desire to exert more control over taxes, services and development patterns, while others may focus on attracting business and open development.

Essentially, this study seeks to help Big Sky understand its options for creating a control panel and the specific motivations, tradeoffs, and opportunities associated with each type of control panel and correlating operators. The ultimate goal is to ensure that Big Sky has the necessary data and tools to ensure that any decision made will be based in fact (not emotion or myth), and will offer potential solutions that will serve residents in a manner that aligns with their needs and priorities.

## **APPROACH**

Treasure State Strategies has unique capabilities and local knowledge to complete an unbiased study that will thoroughly assess essential variables and clearly communicate with the community during the design, implementation, and dissemination of study findings. Specifically, our approach to answering the two key questions outlined above is as follows.

### **A. Legal Analysis – What are the options for incorporation?**

Title 7, chapter 2, part 41 of the Montana Code Annotated (MCA) sets out the statutory procedure for organization and incorporation of a new municipality in the State of Montana. Legal review and analysis of the process will be completed, and a chart will be provided to summarize the basic steps of the incorporation process. To address the most significant decision concerning administration and operation of a new municipality in Montana, staff experts will complete a review of the alternative forms of government authorized under Title 7, Chapter 3, MCA that the new municipality may have such as: (1) commission, (2) commission executive, (3) commission-manager, (4) charter, or (5) other forms and plans of government authorized under law. To assist in the decision-making process, staff experts will compile a comparative analysis of the forms and plans of government in use by municipalities across Montana.

Generally, a law reflects the needs of the people at the time of enactment. It is challenging for the legislature to predict future changes or needs. A robust legal and community analysis will be completed during this study to provide alternative options to organization and incorporation including legislative amendments, new bill drafts, and proposed maps under current law and mapping under potential legislative change. Alternative scenarios such as creating a new county or creating a consolidated city-county government will be analyzed and presented. Additionally, staff will determine the effects incorporation would have on current voting precincts and recommend necessary changes.

### **B. Impacts – What are the tradeoffs associated with different options?**

Incorporation will have various different impacts. This portion of the project aims to help the community understand each potential impact to the greatest extent possible. We propose a three-part process to clarify and standardize each scenario.

#### **1. Describe the context**

The first step in the process entails assembling data to describe current conditions, recent trends, and potential trajectories for population, housing, employment, and tourism to other trajectories to be determined. Specifically, we will assemble data from:

- Decennial Census
- American Community Survey (5-year files) (ACS)
- The Census Bureau's Longitudinal Employer-Household Data (LEHD)
- Montana Cadastral

- Gallatin Association of Realtors
- Big Sky entities (e.g., BSRAD (annual reports, the 2023 Community Capital Improvement Plan), Big Sky School District, Hospital District, Water & Sewer District)
- Mapping
- Available public services funding data

While these sources provide a reasonable description of past and present conditions, it is important to note that small areas like Big Sky may have significant measurement error in the available data.

To provide additional context about Big Sky's current position and potential trajectory, we will also analyze conditions and trends in comparable communities (e.g., high amenity, resort communities).

## **2. Describe the direct impacts of incorporation**

Formally, evaluating impacts entails comparing the expected outcomes with some change to the expected outcomes without the change. Here, the outcomes of interest primarily include service provision, infrastructure, taxes, and economic development or growth (which includes population, employment, economic activity, etc.), and the change(s) to be evaluated relate to incorporation.

Thus, to evaluate the impacts of incorporation, one must understand what incorporation changes. The problem for this portion of the study is that incorporation is not a well-defined change. Some changes are inherent to incorporation, but many potential changes are not. These changes are optional. That is, for each incorporation possibility, there exists a set of services and functions that Big Sky municipality would be required to provide/perform and a set of services and functions that it would be allowed to provide/perform. The second step in the process entails clarifying options and requirements created by incorporation.

To help clarify requirements/options, it is also useful to consider the demand side. For a given level of population and economic activity, there exists a set of services and functions that have to be performed by some entity (e.g., water/sewer, roads, law enforcement). Among these necessary services/functions, who provides them currently, and how might responsibility for these services/functions change under different incorporation options.

Combined, one can divide the potential direct impacts of incorporation into three categories:

1. Changes due to the incorporated entity's legal requirements (i.e., services that the municipality provides that would otherwise not be provided (or not be provided in a similar fashion) without incorporation);
2. Changes to the provision of necessary functions stemming from incorporation (i.e., for services that must exist given the level of economic activity regardless of incorporation, does the existence of municipal entity change the nature/cost of these services relative to the alternative?); and
3. Changes stemming from the municipal entity selecting a different level of services among the allowed choices.

In effect, this part of the process clarifies how incorporation options change the control panel/controller described above.

## **3. Describe the potential wider impacts of incorporation**

The changes described in step two illustrate how incorporation changes the choices available to the community. The final step entails helping the community understand how the availability of different choices might affect the community (e.g., the services available, the level of taxation, or the trajectory of its economy).

Given the wide range of potential impacts, it is impossible to describe every possible change. Among the three

types of potential direct impacts described above, it seems likely that one can reasonably define the changes under (1) and at least some of the main changes under (2) such that one can evaluate their impacts using standard methods. For example, a potential scenario indicates that municipal Big Sky would be required to provide X, based on data from other places, providing X costs \$Y, adjusting for differences between other places and Big Sky (e.g., cost of living, nature of resort community), it will likely cost \$Z to provide X in Big Sky.

However, some parts of (2) and all of (3) are discretionary. The changes associated with incorporation depend on the choices of those empowered to make these decisions. These changes are unknown (and, to some degree, unknowable), and their impact is unknown (and, to some degree, unknowable).

Given the importance of these discretionary impacts to understanding the potential tradeoffs associated with incorporation, we propose a three-step process to help the community evaluate potential discretionary changes and their impacts:

1. Clarify the key choices where incorporated Big Sky might make different choices than the alternative. Given that it is impossible to identify and evaluate every choice that incorporated Big Sky may face, in this step, we will identify some key illustrative examples such as:
  - a. What big problems has Big Sky faced in its past;
  - b. What problems is it currently facing; and
  - c. What are reasonably foreseeable problems it will face in the future?
2. Clarify how the process of addressing these problems would differ with incorporation. For each of these problems, clarify how incorporation would change the process for addressing these issues including, but not limited to:
  - a. How are choices made under the existing system;
  - b. Who makes the decision, based on what information or input;
  - c. Whose voices matter; and
  - d. How would the decision-making process change with incorporation?
3. Describe the potential impacts of choice.
  - a. If given the opportunity to make different choices, do incorporated places make different choices?
  - b. If so, do these choices matter (i.e., do they change outcomes from what they would otherwise be)?

These steps may be described as delivering a mini course (or overview report) on regional economics, with special applications to incorporation, resort communities, and the impact of differences in taxes and public services on outcomes. Specifically, preparing this would entail reviewing research on the impacts of incorporation, the impacts of public services/taxes on local economies, and the economic trajectories of high-amenity resort communities. It would also likely entail some original analyses designed to identify (a) how different communities address similar problems, (b) how these choices vary depending on incorporation, and (c) how different choices shape outcomes.

The ultimate goal of this step would be to help clarify the range of potential foreseeable outcomes for Big Sky, clarify the main forces that will shape the likelihood of the different potential outcomes, and, tying back to the first two steps, how incorporation might shape/change where Big Sky falls within the foreseeable range.

### **C. Community Engagement – Transparency and open communication**

The engagement of the community is paramount in ensuring transparency and open communication; both essential elements in producing a positive final product for consumption by the community as a whole. The incorporation study will rely on extensive analysis, modeling, stakeholder engagement, and community input to ensure equity. This study will complement existing community improvement plans and goals of partnership



non-profit organizations and private entities, including leveraging the insights provided from the “Government and Community Engagement Exploration” project completed in 2023. To that end, Treasure State Strategies will utilize multiple platforms and mediums to ensure active participation and awareness.

Treasure State Strategies will create an informative website which will serve as an online hub and central resource for the public, providing regular updates on the study’s progress, key findings, and opportunities for input. We will also provide monthly updates at the BSRAD public meetings, allowing for feedback, questions, and contributions. In collaboration with BSRAD, Treasure State Strategies would also like to hold two informal “open house” events at the beginning and mid-point of the project, which will provide an opportunity for citizens and stakeholders to meet the professionals working on the study, ask in-depth questions, and gain an active understanding of the depth and breadth of the work encompassed within the study.

Under Montana Law, there are two types of resort tax: area and community. Considering the interplay between BSRAD and the possibility of a newly formed Big Sky municipality, the Treasure State Strategies team will conduct targeted outreach with specific resort tax communities potentially including: Whitefish, Red Lodge, West Yellowstone, and Virginia City. Targeted outreach with similarly situated resort tax areas like Big Sky will include, but may not be limited to: Gardiner, Cook City, and St. Regis. Additionally, some outreach with non-resort tax communities such as Seeley Lake, Phillipsburg, and Big Fork will be completed as needed. We will conduct research and interviews centering on population demographics, municipal structures, authorities and powers, service provisions, financing mechanisms, and infrastructure with a focus towards gaining insight into current challenges, opportunities, and lessons learned.

Treasure State Strategies will also monitor ballot measure efforts relating to the study of local governance models and the potential impacts for BSRAD and Big Sky.

### **BSRAD Staff Engagement (Tasks)**

In carrying out the Incorporation Exploration Study, Treasure State Strategies may engage with BSRAD staff on an as-needed basis to solicit feedback and ensure the study accurately reflects the needs of the District while maintaining an unbiased and impartial study. Treasure State Strategies may rely on BSRAD staff to provide relevant data available to BSRAD, including but not limited to maps, prior studies and documents, and general historical knowledge.

Treasure State Strategies will also enlist the guidance of BSRAD when publicizing the study’s webpage, planning the community “open house” style events, and when planning public presentations at the close of the study.



## TIMELINE

This timeline is subject to change based on the needs of BSRAD, the project team, and the pace of the study. Additional meetings, events, and milestones will be added as the study takes place.

### PHASE I • June - November 2024

#### June 2024

6/1/24 - Official Project Start Date  
6/6/24 - Standing Team Meeting  
6/14/24 - Website Launch (Private Release)  
6/17/24 - Update to BSRAD  
6/20/24 - Standing Team Meeting  
6/24 - Website Live (Public Launch)

#### July 2024

7/4/24 - 4th of July - No Meeting  
7/11/24 - Team Meeting  
7/15/24 - Update to BSRAD  
7/25/24 - Team Meeting

#### August 2024

8/8/25 - Team Meeting  
8/19/24 - Update to BSRAD  
8/22/24 - Team Meeting

#### September 2024

9/5/24 - Team Meeting  
9/16/24 - Update to BSRAD  
9/19/24 - Team Meeting

#### October 2024

10/3/24 - Standing Team Meeting  
10/14/24 - Update to BSRAD  
Deliverable: Existing MT Law/Statute Overview  
10/17/24 - Standing Team Meeting  
10/31/24 - Standing Team Meeting

#### November 2024

11/14/24 - Standing Team Meeting  
11/18/24 - Update to BSRAD  
11/28/24 - Thanksgiving - No Meeting

#### PHASE I Ongoing Activities:

Non & Resort Community Interviews  
Community Engagement & Updates  
Data Gathering & Research  
Complete Data Gathering & Research  
Community Engagement & Updates  
Analysis

### PHASE II • December 2024 - March 2025

#### December 2024

12/5/24 - Standing Team Meeting  
12/16/24 - Update to BSRAD  
12/19/24 - Standing Team Meeting  
12/30/25 - Standing Team Meeting

#### January 2025

1/2/25 - Standing Team Meeting  
1/13/25 - Update to BSRAD  
1/16/25 - Standing Team Meeting  
1/30/25 - Standing Team Meeting

#### February 2025

2/13/25 - Standing Team Meeting  
2/17/25 - Update to BSRAD  
2/27/25 - Standing Team Meeting

#### March 2025

3/13/25 - Standing Team Meeting  
3/17/25 - Update to BSRAD  
3/27/25 - Standing Team Meeting

#### PHASE II Ongoing Activities:

Editing & Document Assembly  
Community Engagement & Updates  
Analysis  
Draft Report Compilation

### PHASE III • April 2025 - June 2025

#### April 2025

4/10/25 - Standing Team Meeting  
4/14/25 - Update to BSRAD  
4/24/25 - Standing Team Meeting

#### May 2025

5/8/25 - Standing Team Meeting  
5/19/25 - Update to BSRAD  
5/22/25 - Standing Team Meeting  
TBD - Public Presentations  
TBD - Deliver Finalized Report

#### Ongoing Activities:

Editing & Document Assembly  
Community Engagement & Updates  
TBD - BSRAD Review

#### June 1, 2025 - Project Completion Date

## BUDGET

Entity	Cost Type	Description	Cost	Change Order (Hourly)
Treasure State Strategies	Professional Services	General Oversight & Project Management, Community Engagement, Legal & Statutory Review and other services as appropriate; TSS Staff Travel; Indirect Costs; Consulting (Other than vendors listed below)	\$447,000	\$300
<b>Vendor Total</b>			<b>\$575,000</b>	
EA Bills Consulting LLC	Professional Services	Project Management; Legal & Statute Review, Research & Data Collection; Analysis		\$300
ABMJ Consulting	Professional Services	Research & Data Collection; Analysis; Travel		\$300
MadAve Communications	Professional Services	Marketing & Advertising; Design & Copywriting		\$175
<b>Grand Total</b>			<b>\$1,022,000</b>	

## CHANGE ORDERS

In accordance with the terms outlined in the Request for Proposal (RFP) for the Incorporation Exploration Study issued by the Big Sky Resort Area District, we propose the following change order rates:

1. Professional Services: **Hourly Rate: \$300**
2. Design and Copy Writing/Editing Services: **Hourly Rate: \$175**

These rates reflect our standard pricing for additional services that may be required beyond the scope of the original proposal. Any change orders will be documented and approved in writing by both parties prior to commencement of the additional work.

# License



## MONTANA SECRETARY OF STATE

July 21, 2023

Kali Wicks  
kwicks48@gmail.com

### CERTIFICATION LETTER

I, CHRISTI JACOBSEN, Secretary of State for the State of Montana, do hereby certify that

#### **Treasure State Strategies LLC**

filed its Articles of Organization for Domestic Limited Liability Company with this office and has fulfilled the applicable requirements set forth in law. By virtue of the authority vested in this office, I hereby issue this certificate evidencing the filing is effective on the date shown below.

**Certified File Number:** C1376433 - 15746344

**Effective Date:** July 21, 2023

You must maintain a Registered Agent for your company. Failure to do so will subject the business to administrative dissolution/revocation. Your company's annual report is due by April 15th of the next year and each consecutive year thereafter.

Thank you for being a valued member of the Montana business community. I wish you continued success in your endeavors.

A handwritten signature in black ink that reads "Christi Jacobsen".

Christi Jacobsen  
Montana Secretary of State



# Team Members



**Kali Wicks, MA; MPA / CPH - President, Treasure State Strategies • Helena, MT**

Kali will provide general oversight, project management, and community engagement for the incorporation exploration summary, along with contributing to all other portions of the study. She will serve as a key contact for BSRAD and any related subcommittees or staff and will be available during normal business hours to ensure prompt communication with the District. She will provide monthly progress reports via e-mail to the District and will attend regular meetings when requested.

Kali has over a decade of experience in government affairs including community and legislative relations, research and policy development, statutory analysis, lobbying, regulatory implementation and project management. She holds a Master of Arts in Communications and Leadership (Gonzaga University) and a Master of Public Administration and Certificate in Public Health (University of Montana).

As a former Helena City Commissioner, Kali also has broad experience in local governance policy. During her time as a Commissioner, Kali focused on improving city services, updating internal city policies, budgets, revenue generation, zoning and economic development. She also served as a member of the 2020 Census Committee, Montana Business Assistance Connection Board, The City Zoning Commission, and the Helena Chamber of Commerce Board.

Kali also has extensive experience within state government including community development and housing (Montana Department of Commerce) workforce development (Montana Department of Labor) and higher education (Office of the Commissioner of Higher Education). Highlights from her time at the state include establishing the Quality Schools Grant Program, an effort involving building the program from the ground up, including overseeing a staff of five, writing new policies and processes, establishing relationships with all Montana school districts and community stakeholders, developing a grant application process, providing technical assistance and administering more than \$60 million in funds to Montana Schools over a biennium with zero audit findings.

**Key Roles:** General Oversight & Project Management; Communications & Community Engagement



**Erin Bills, J.D., MPH, EABills Consulting Services (Consultant) • Big Sky, MT**

In partnership with Kali Wicks, Erin will provide general oversight and project management, for the incorporation exploration study. Erin will also conduct legal analysis, statutory review, assist in directing community engagement, and will perform general research design, collection, and analysis. She will serve as a key community contact.

Erin Bills owns and operates a consulting firm specializing in public health and policy needs of developing, rural communities. Ms. Bills is an epidemiologist and lawyer, holding a Bachelor of Science in Biology and Environmental Science from Rocky Mountain College, an MPH from the University of Montana, and a Juris Doctorate from the University of Montana School of Law. Ms. Bills is also fellowship trained in public health leadership by the Northwest Center for Public Health Practice at the University of Washington School of Public Health.

Erin has more than twenty years of experience helping government, nonprofits, communities, educational institutions, and businesses advance their goals.



## Erin Bills, (Continued)

Her area of expertise in the study of law includes: the legislative process, nonpartisan legal analysis, policy drafting and analysis, environmental and natural resource law, water law, healthcare law, oil and gas law, climate law, local government, and constitutional law. Her area of expertise in public health includes: epidemic analysis, public health assessment, public health business planning, program evaluation, and social capital. She has drafted and advocated for legally-binding, science-based climate recovery policies at the federal level and across many state legislatures, served as Legislative Counsel for the State of Montana Legislature where she drafted and legally analyzed complex water, energy, environmental, conservation, and public health policies for the people of Montana, conducted public health assessments for all 56 counties in Montana while working for Montana State University, and taught courses in epidemiology and public health business planning and policy for both Montana State University and University of Montana. In the past ten years, she has gained extensive experience working with resort communities across the American West and with the snow sport industry.

Specific to Big Sky, Erin helped establish the Big Sky Medical Center in 2013 by serving as a member of the Big Sky/West Yellowstone Healthcare Direction Committee, she co-authored the Big Sky Climate Action Plan (CAP) with the local non-profit, Big Sky SNO [Sustainable Network Organization] in 2022, recently served as a non-profit representative for the Coordinating Council of Big Sky to ensure implementation of community strategic plans, and Erin has helped to develop sustainable solutions for the private sector to help the community work towards sustainability. In the summer of 2023, she served as a member of the Big Sky Resort Area District (BSRAD) subcommittee on incorporation exploration. Erin has extensively researched incorporation under existing Montana law.

Erin lives in Big Sky with her husband and young family. She is committed to performing an unconstrained study to better inform her home community on the issue of incorporation.

**Key Roles:** General Oversight & Project Management; Legal & Statute Expertise; Research & Data Collection; Data Analysis



**Harold Blattie, *Principal*, Treasure State Strategies • Billings, MT**

Harold will perform research and data collection, analysis, and legal and statute review for the incorporation study, as well as serve as a valuable resource with regard to Montana's historical local governance policies. Harold served as a member of the Montana Local Government Study Commission in 1995-1996, where he began his journey of discovery and learning about alternative forms and plans for government allowed for communities under Montana Law.

As the Executive Director of the Montana Association of Counties (MACo) for a number of years, Harold has interacted with county and municipal governments across the state and is a well respected expert in governance and finance. In fact, one of Harold's favorite tasks while serving at MACo was to take on the "help desk" task - fielding questions about all aspects of community development, planning, and government and helping local officials and staff problem solve. Harold has over 20 years of experience with the legislative process, including advocacy on behalf of local governments to the Montana legislature.

Harold has previously collaborated on the drafting of the Local Government Study Commission Handbook which serves as the "textbook" for Study Commissions in Montana. He has presented at training sessions for study commissions as well as having been a resource for study commission members seeking advice. Harold will bring a very practical, hands-on perspective to the Treasure State Strategies Team.

**Key Roles:** Research & Data Collection; Legal & Statute Expertise



**Bryce Ward, Ph.D., ABMJ Consulting (Consultant) • Missoula, MT**

Bryce Ward will conduct research, collect data, and prepare economic analysis to address questions related to Big Sky's current conditions and how conditions might change under different incorporation scenarios.

Bryce Ward holds a Ph.D. in economics from Harvard University. Dr. Ward is a co-founder of ABMJ Consulting. Previously, he served as a Senior Research Professor/Associate Director at the Bureau of Business and Economic Research at the University of Montana, as a Research Associate and the University of Montana's Rural Institute, and as a Senior Economist at ECONorthwest, a Portland, OR based economics consulting firm.

Dr. Ward's areas of expertise include econometric analysis and applied microeconomics including: urban and regional economics, labor economics, public finance, social capital, health economics, and environmental and natural resource economics. Dr. Ward has applied his expertise to a variety of projects involving litigation support and policy analysis, including dozens of projects describing local economies and examining the impacts of policy choices on them. He has provided oral and written testimony in dozens of court, legislative, or administrative proceedings. Dr. Ward has taught microeconomic theory, econometrics, labor economics, public finance, environmental and natural resource economics, and social economics courses at Harvard University, Lewis and Clark College, the University of Oregon, Portland State University, and the University of Montana.

**Key Roles:** Research & Data Collection; Data Analysis



**Ali Mandell, MadAve Communications (Consultant) • Helena, MT**

Drawing on over 20 years of diverse industry experience in marketing, advertising, public relations, and communications, Ali brings corporate experience and professional expertise to the team. Notably, Ali has successfully led two significant rebranding projects: the transformation of American Federal Savings Bank into Opportunity Bank of Montana and the rebranding of Anderson ZurMuehlen before its acquisition by Pinion Global. As a former leader at St. Peter's Health, Anderson ZurMuehlen (now part of Pinion Global), and Opportunity Bank, Ali has spearheaded impactful strategic communications, marketing, advertising, and media plans that drove growth and enhanced brand presence. Ali has been named a '20 Under 40' recipient in Helena and has served on various Montana boards and leadership teams, including Helena Area Chamber of Commerce, Helena Area Community Foundation, and Hometown Helena, and is a '22 graduate of Leadership Montana. Ali holds a Bachelor of Arts in Broadcast Journalism with a minor in Communications and is currently finalizing her Accreditation in Public Relations (Public Relations Society of America).

**Key Roles:** Marketing, Advertising, Public Relations, Strategy, Media, & Design

# References

## TREASURE STATE STRATEGIES

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**Bill Lombardi**, *Former VP of Government Affairs*  
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**Dr. Sara Rinfret**, *Former MPA Director*  
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**Rep. Greg Oblander**, *Montana State Legislator*  
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**Rep. Katie Sullivan**, *Montana State Legislator*  
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## TREASURE STATE STRATEGIES

### Harold Blattie

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## EABILLS CONSULTING SERVICES

**Todd Everts**, *Director of Legal Services & Code Commissioner*  
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teverts@mt.gov  
406-444-4023

**Anthony Johnstone**, *Circuit Judge*  
United States Court of Appeals, 9th Circuit  
University of Montana School of Law  
Anthony.Johnstone@umontana.edu

**Michelle Bryan**, *Professor*  
Alexander Blewett III School of Law  
University of Montana  
Michelle.Bryan@umontana.edu  
406-243-6753

## ABMJ CONSULTING

**Steve Arveschoug**, *Executive Director*  
Big Sky Economic Development  
stevea@bigskyeda.org  
406-869-8401

**Grant Kier**, *CEO*  
Missoula Economic Partnership  
gkier@missoulapartnership.com  
406-541-6461

**Aaron Wernham**, *CEO*  
Montana Healthcare Foundation  
Aaron.Wernham@mthcf.org  
406-451-7060

## MADAVE COMMUNICATIONS

**Jacque Tescher**, *Public Relations Supervisor*  
St. Peter's Health  
jtescher@sphealth.org  
406-437-8291

**Laura Clark**, *CEO*  
Opportunity Bank of Montana  
lclark@oppbank.com  
406-459-6194

# Warranty

Treasure State Strategies hereby agrees to perform the professional services (“Services” described on page 9) during the term of the study.

Treasure State Strategies warrants that it will use best efforts during the performance of such Services to promote the interests of the community of Big Sky, Montana during the term of study. Treasure State Strategies agrees to use its best efforts to comply with all laws governing Big Sky Resort Area District activities including but not limited to those contained in the Internal Revenue Code.

Treasure State Strategies will be responsible for any action, omission, or deficiency in the work product of any vendors, agents or subcontractors engaged, excluding the United States Postal Service. In addition, Treasure State Strategies will ensure that all vendors, agents, or subcontractors (excluding the United State Postal Service) exercise a high degree of care and diligence in the rendering of all services under this study, in accordance with the highest professional standards prevailing. Treasure State Strategies will validate that all work listed on the itemized invoices was (i) completed in full; (ii) free of error or inaccuracies; and that such services performed satisfied and complied with all program criteria, applicable laws and prerequisites as specified and detailed herein. If such work should reasonably be considered deficient, or not acceptable or satisfactory to Big Sky Resort Area District, Treasure State Strategies agrees to make such work acceptable and satisfactory at its own cost.





APPENDIX A

# Professional Resumes



# Kali Wicks • MPA, CPH

## SUMMARY

Kali Wicks owns a government relations and consulting firm located in Montana's capitol city (Helena). She has over a decade of legislative and regulatory affairs experience working in local and state policy.

## EDUCATION

**Certificate in Public Health**, University of Montana, Missoula, MT

**Master of Public Administration**, University of Montana, Missoula, MT

**Master of Communications & Organizational Leadership**, Gonzaga University, Spokane, WA

**B.A. in Political Science & Minor in Public Relations**, Gonzaga University, Spokane, WA

## APPOINTMENTS, SPEAKING ENGAGEMENTS & HONORS

**Montana Ambassador**, Gubernatorial Appointment, 2020 – Current

**Graduation Speaker**, MPA Program at Blewett School of Law – University of Montana, 2022

**Volunteer of the Year**, BCBSMT, 2020

**Helena's 20 under 40 Award**, 2019

**Special Achievement Award**, Helena Chamber, 2018

**Guest Lecturer**, Carroll College/University of Montana, 2016 – 2020

## WORK EXPERIENCE

**Treasure State Strategies**, *President & Founder*, Helena, MT • 2023 - Current

Provides public and private clients with government relations services and a strategic presence in Helena. Core services include state and local lobbying, issue advocacy, legislative strategies, public policy consulting, coalition building and government procurement services. Example successes include helping a non-profit state-wide career technical student organization navigate Montana's political environment and legislative process to gain a state funding increase for the first time in ten years with a straightforward, fact-based lobbying effort centering on student success and workforce development.

**Blue Cross and Blue Shield of Montana (Health Care Service Corporation)**, *Government Relations Manager*, Helena, MT • 2014 - 2024

Led Montana's largest health insurance agency in government affairs and regulatory relations including legislative strategy, building long-lasting relationships on both sides of the aisle and across democrat and republican administrations, developing and executing plans to pass or defeat legislation, writing legislation, direct lobbying, performing grassroots and issue advocacy, coalition building, regulatory relations, tribal relations, and managing a federal political action committee. Worked closely with related health plans in several states on joint initiatives and legislative campaigns and advised on state and federal matters relating to rural health and business issues.

**City of Helena**, *City Commissioner*, Helena, MT • 2018 - 2019

Appointed to City Commission to serve the remainder of term when the seat was vacated by former Rep. Rob Ferris-Olsen to serve in the legislature. Oversaw City Manager and executive city staff, developed and approved city budget, served as quasi-judicial body on land-use and planning and zoning determinations, represented City of Helena on boards including the Helena Chamber of Commerce, Montana Business Assistance Connection, and Zoning Board.

# Erin A. Bills • JD, MPH

## SUMMARY

An epidemiologist and lawyer, Erin Bills owns and operates a boutique consulting firm based in Big Sky, MT that focuses on addressing many issues rural and developing communities face. She is a fourth generation Montanan and has dedicated her education and career to help the people of this great state.

## EDUCATION

**Juris Doctor**, Alexander Blewett III School of Law at the University of Montana, Missoula, MT

**Master of Public Health**, University of Montana, Missoula, MT

**B.S. Biology & Environmental Science**, Rocky Mountain College, Billings, MT

## WORK EXPERIENCE

**EABills Consulting Services**, *President & Founder*, Big Sky, MT • 2021 - Current

Provide public, private, and non-profit consulting services with respect to environmental and land use sustainability efforts and issues, climate action plans, water issues and waste reduction, governmental policies and procedures involving sustainability practices, and collaboration, liaison, and relations with local, state, tribal, and federal agencies, and community efforts.

**Montana State Legislature, Legislative Services Division**, *Legislative Counsel*, Helena, MT • 2016 - 2018

Wrote bills, resolutions, and amendments for introduction in the Legislature. Provided nonpartisan legal analysis for complex water, energy, environmental, conservation, and public health policy. Staffed the Water Policy Interim Committee (WPIC) and the Environmental Quality Council (EQC). Prepared the Montana Code and Annotations (MCA). Reviewed proposed administrative rules and ballot measures for compliance with constitutional, statutory, and case law requirements. Acquired in-depth knowledge of various issues areas and served as the issue expert for requests from national, state, and local agencies, organizations, and members of the public.

**University of Montana**, *Epidemiologist, Adjunct Instructor, and Program Evaluation*

Bozeman, MT • 2011 - 2014

Provided program evaluation services for all Montana Office of Rural Health/Area Health Education Center (MORH/AHEC) program activities and structure evaluation plans for rural hospitals and other state agencies. Conducted public health assessments for all 56 counties in Montana. Established a regionalized model of care for improved pediatric trauma outcomes in rural Montana. Structured statewide rural health initiatives based on evaluation findings. Provided evidence for sustainability and growth of the AHEC primary care initiatives with the University of Washington School of Medicine, Montana WWAMI Program. Evaluator for liaison projects with Tribal Colleges and Tribal Health entities in Montana. Authored grant applications and managed the diverse MORH/AHEC grant portfolio. Created a rural health collaborative between Montana State University and University of Montana.

# Harold Blattie

## SUMMARY

Harold has nearly 50 years of local government experience, first as an elected school board member, then as an elected commissioner in Stillwater County. He then began a career with the Montana Association of Counties (MACo) in 2002. He served as the MACo Assistant Director from January 2002 until July 2005 after which he served as the Executive Director, a position he held until retirement in 2018. He continues to provide limited assistance when requested.

Selected as Vice-Chair of the Local Government Funding and Structure Interim Legislative Committee, Elected as President of the National Council of County Association Executives. Appointed to the Federal Lands Access Committee of the Federal Highway Administration. Named as Weed Fighter of the Year by the Montana Weed Control Association.

## EDUCATION

Northern Montana College  
Eastern Montana College

## WORK EXPERIENCE

### **Montana Association of Counties, Executive Director • 2005 - 2018**

- Provided lobbying and advocacy services at the state and federal levels, helping to create and implement public policy to assist counties to serve their public purpose objectives.
- Served as Executive Director/CEO for MACo's Health Care Trust, Property Casualty Trust and Workers Compensation Trust Group Risk Sharing Pools which provided group risk sharing insurance coverage to MACo member counties. Oversaw bringing many pool-related functions in house, resulting in significant fiscal savings.
- Conducted education and training to elected officials, board members and legislators on many areas of expertise, including local government structure and organization, budgeting and finance, personnel and HR, implementation of the Hard Rock Mining Impact Act and others.

### **Montana Association of Counties, Assistant Director • 2002 - 2005**

- Assisted the Executive Director in the operation of the organization and assumed many of his responsibilities in his absence.
- Lobbying and advocacy services for counties based upon specific areas of expertise.
- Was gradually assigned more direct responsibilities prior to being selected as the Executive Director upon the retirement of the Executive Director. During that period, the Executive Director and Assistant Director split lobbying functions based upon specific areas of interest and knowledge, with some being shared equally.

### **Stillwater County, County Commissioner • 1995 - 2002**

- Served as a member of the three-member Governing Body for Stillwater County
- Provided leadership on many policy changes and increases in the service levels to county residents, including efficiencies in the solid waste and road departments and the development and implementation of a Capital Improvement Plan and Funded Leave Liability.
- Conducted many administrative functions, a necessity for a commissioner in a small county where staff is not available as in larger counties.

# Bryce Ward • PhD

## SUMMARY

Bryce Ward is the founder of ABMJ Consulting, which provides economic, statistical, and policy analysis. Dr. Ward's areas of expertise include econometric analysis and applied microeconomics - including urban and regional economics, labor economics, social interactions/social capital, health economics, public finance, and environmental and natural resource economics. Dr. Ward has applied his expertise to a variety of projects involving litigation support and policy analysis. Dr. Ward has taught courses in a variety of areas at Harvard University, Lewis and Clark College, the University of Oregon, Portland State University, and the University of Montana.

## EDUCATION

**Ph.D. Economics**, Harvard University

**B.A. in Economics and History**, University of Oregon

## WORK EXPERIENCE

**ABMJ Consulting**, *Founder* • 2014 - Current

**University of Montana Bureau of Business and Economic Research**, *Associate Director* • 2014 - 2018

**ECONorthwest**, *Senior Economist* • 2005 - 2013

- Obtain and manage projects from conception to completion
- Identify and clarify the relevant questions
- Obtain data and information required to address questions
- Conduct analysis necessary to answer questions, including statistical analyses designed to identify the effect of a policy or event on key outcomes
- Write, format, and edit reports
- Prepare and deliver presentations of findings to clients, public, or to courts

# Alexandra (Ali) Mandell

## SUMMARY

Ali Mandell has over 20 years of experience directing and executing marketing, advertising, media, and public relations strategies, campaigns, and initiatives for various industries, including finance, retail, healthcare, nonprofit, mortgage, IT, and education.

## EDUCATION

**B.A. in Broadcast Journalism, Minor in Communications**, University of Montana  
**Bank Marketing & Management**, Emory University - American Bankers Association

## WORK EXPERIENCE

**MadAve Communications**, *Founder & Director* • 2022 - Current

MadAve Communications is a full-service communications company specializing in public relations, public affairs, business development, marketing, media, and advertising services.

**St. Peter's Health**, *Director of Public Relations & Marketing* • 2022 - 2023

Ali was responsible for marketing, advertising, community benefit, and public relations programs. She worked closely with the Chief People and Communications Officer, CEO, Executive Leadership, and Directors to grow the lines of business.

**Anderson ZurMuehlen (Now Pinion Global)**, *Director of Business Development & Marketing* • 2018 - 2022

Ali led business development, marketing, advertising, and public relations programs. She collaborated with the CEO, shareholders, and Business Unit Directors to grow lines of business. Ali also led and directed the successful rebranding of Anderson ZurMuehlen, including logos and website redesigns, as well as the bridge campaign to transition to the new branding.





APPENDIX B

# Treasure State Strategies Additional Licensure and Insurance Documents

Date of this notice: 09-22-2023

Employer Identification Number:  
93-3553119

Form: SS-4

Number of this notice: CP 575 G

TREASURE STATE STRATEGIES  
KALI WICKS SOLE MBR  
1040 SONOMA DR  
HELENA, MT 59601

For assistance you may call us at:  
1-800-829-4933

IF YOU WRITE, ATTACH THE  
STUB AT THE END OF THIS NOTICE.

WE ASSIGNED YOU AN EMPLOYER IDENTIFICATION NUMBER

Thank you for applying for an Employer Identification Number (EIN). We assigned you EIN 93-3553119. This EIN will identify you, your business accounts, tax returns, and documents, even if you have no employees. Please keep this notice in your permanent records.

Taxpayers request an EIN for their business. Some taxpayers receive CP575 notices when another person has stolen their identity and are opening a business using their information. If you did **not** apply for this EIN, please contact us at the phone number or address listed on the top of this notice.

When filing tax documents, making payments, or replying to any related correspondence, it is very important that you use your EIN and complete name and address exactly as shown above. Any variation may cause a delay in processing, result in incorrect information in your account, or even cause you to be assigned more than one EIN. If the information is not correct as shown above, please make the correction using the attached tear-off stub and return it to us.

A limited liability company (LLC) may file Form 8832, *Entity Classification Election*, and elect to be classified as an association taxable as a corporation. If the LLC is eligible to be treated as a corporation that meets certain tests and it will be electing S corporation status, it must timely file Form 2553, *Election by a Small Business Corporation*. The LLC will be treated as a corporation as of the effective date of the S corporation election and does not need to file Form 8832.

To obtain tax forms and publications, including those referenced in this notice, visit our Web site at [www.irs.gov](http://www.irs.gov). If you do not have access to the Internet, call 1-800-829-3676 (TTY/TDD 1-800-829-4059) or visit your local IRS office.



15746344



**STATE OF MONTANA**  
SECRETARY OF STATE  
ARTICLES OF ORGANIZATION FOR DOMESTIC LIMITED  
LIABILITY COMPANY

For Office Use Only  
STATE OF MONTANA  
**-FILED-**  
SECRETARY OF STATE  
File Number: 15746344  
Date Filed: 7/21/2023 3:51:09 PM

FILING FEE: \$35.00

B1077-4979 07/21/2023 3:51 PM Received by MT Secretary of State Christi Jacobsen

Filing Fees & Processing Options							
Fees and Processing Options	Standard Processing - \$35.00 - Up to 7 - 10 business days processing						
Filing Effective Date							
The entity will be effective:	when filed with the Secretary of State						
Limited Liability Company Type							
Type of Limited Liability Company	Limited Liability Company (LLC)						
Limited Liability Company Name							
Entity Name	Treasure State Strategies LLC						
Term							
Term Expiration	Perpetual / Ongoing						
Business Purpose							
Purpose	Consulting						
Business Mailing Address of Principal Office							
Address	1040 SONOMA DR HELENA, MT 59601						
Business Physical Address of Principal Office							
<input type="checkbox"/> Add Physical Address							
Registered Agent In Montana							
Registered Agent	Kali Wicks Non-Commercial Registered Agent Agent Number RA1376431 Email Address kwicks48@gmail.com Website Physical Address 1040 SONOMA DRIVE HELENA, MT 59601 Mailing Address 1040 SONOMA DR HELENA, MT 59601						
<input checked="" type="checkbox"/> The appointment of the registered agent listed above is an affirmation by the represented entity that the agent has consented to serve as a registered agent.							
LLC Management							
LLC Managed By	Members						
Are Members Liable?	No						
Members							
<table border="1"> <thead> <tr> <th>Name Of Individual Or Business Entity</th> <th>Business Mailing Address</th> <th>Email Address</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>		Name Of Individual Or Business Entity	Business Mailing Address	Email Address			
Name Of Individual Or Business Entity	Business Mailing Address	Email Address					





TREASTA-14

KHENDESON

# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
3/19/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).


<b>PRODUCER</b> First West, Inc. P.O. Box 1800 Bozeman, MT 59771	<b>CONTACT NAME:</b> Kelly Henderson	
	<b>PHONE (A/C, No, Ext):</b> (406) 922-6055	<b>FAX (A/C, No):</b> (406) 587-9162
<b>E-MAIL ADDRESS:</b> khenderson@1stwestinsurance.com		
<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
<b>INSURER A :</b> Cincinnati Insurance Company		<b>10677</b>
<b>INSURER B :</b> Travelers Casualty Insurance Company of Americ		<b>19046</b>
<b>INSURER C :</b>		
<b>INSURER D :</b>		
<b>INSURER E :</b>		
<b>INSURER F :</b>		

**COVERAGES** **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR			SBB 0007388	12/1/2023	12/1/2024	EACH OCCURRENCE \$ 1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO JECT <input type="checkbox"/> LOC OTHER:						DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000
							MED EXP (Any one person) \$ 5,000
							PERSONAL & ADV INJURY \$ 1,000,000
							GENERAL AGGREGATE \$ 2,000,000
							PRODUCTS - COMP/OP AGG \$ 2,000,000
							<b>HNOA</b> \$ Included
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$
							BODILY INJURY (Per person) \$
							BODILY INJURY (Per accident) \$
							PROPERTY DAMAGE (Per accident) \$
							\$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$
							AGGREGATE \$
							\$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y / N <input type="checkbox"/> N / A If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/>
							E.L. EACH ACCIDENT \$
							E.L. DISEASE - EA EMPLOYEE \$
							E.L. DISEASE - POLICY LIMIT \$
B	Professional Liab			107948054	12/1/2023	12/1/2024	1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

<b>CERTIFICATE HOLDER</b>  Big Sky Resort Area District P.O. Box 160661 Big Sky, MT 59716	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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ACORD 25 (2016/03)

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# Montana Department of LABOR & INDUSTRY

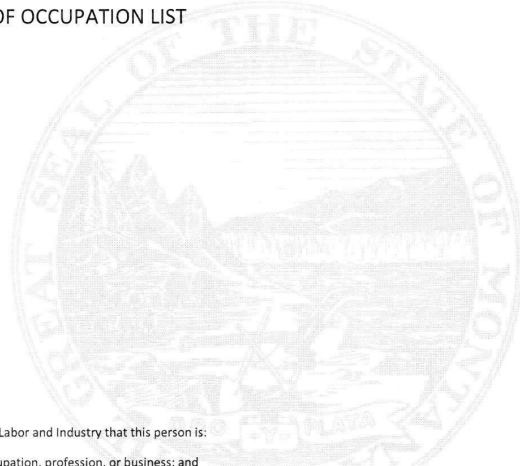
04/08/2024-04/07/2026 Government Relations, Lobbying,  
Consulting-Government Affairs, Local Government  
END OF OCCUPATION LIST

## INDEPENDENT CONTRACTOR EXEMPTION CERTIFICATE

IC#: 394423IC

### Certificate Holder:

KALI E WICKS  
PO BOX 7342  
HELENA, MT 59604



The certificate holder has sworn to the Department of Labor and Industry that this person is:

\*engaged in an independently established trade, occupation, profession, or business; and  
\*free from control and direction by hiring agents over the performance of the person's services, both under contract and in fact, when working as an independent contractor

The named certificate holder has waived all rights and benefits under the Workers' Compensation Act of Montana and is not required to be personally covered by workers' compensation insurance while working as an independent contractor in the occupation(s) listed above.

See back for important information

1/1

1. The certificate has important information on the back. If making copies to provide to hiring agents, please copy both the front and back of the certificate and provide both sides to the hiring agent. You may make copies as needed. The status can be verified by visiting our website at [mtcontractor.mt.gov](http://mtcontractor.mt.gov) or by calling our office at 406-444-7734.
2. Please notify our office of changes to your information, including changes to your address, phone number, business name and structure, and any occupations you may wish to add or remove. Failure to keep your information current may result in the revocation of your ICEC.
3. The wallet card below is provided as a way for you to conveniently identify yourself as an ICEC holder to Department of Labor representatives. It should not be given to hiring agents as proof of independent contractor status because the full occupation descriptions are not displayed. North American Industry Classification System (NAICS) codes have been assigned based on the occupation descriptions you submitted and are for Department reference only. The NAICS codes alone do not represent the occupation(s) you are approved for as an Independent Contractor. Full occupation descriptions are displayed on the certificate and can be verified by visiting our website at [mtcontractor.mt.gov](http://mtcontractor.mt.gov).

INSTRUCTIONS: Fold at perforations then tear card out. Fold card in half at score.

<p><b>INDEPENDENT CONTRACTOR EXEMPTION CARD</b></p> <p>KALI E WICKS PO BOX 7342 HELENA, MT 59604 IC#: 394423IC</p> <p>This wallet card is provided as a way for you to identify yourself as an ICEC holder to Montana Department of Labor representatives. Assigned NAICS codes are for department reference only. For full occupation descriptions refer to the certificate.</p>	<p><b>Exempt Occupations Valid Until: 04/07/2026</b></p> <p>541820 Government Relations, Lobbying, Consult</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
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