

**BOW VALLEY REGIONAL TRANSIT SERVICES COMMISSION  
ANNUAL ORGANIZATIONAL MEETING**

**Via Zoom**

**AGENDA**

**October 13, 2021 – Approximately 3:30 pm (Immediately Following Regular Meeting)**

1. Call to Order
2. Approval of the Agenda
3. Motion to adopt the 2022 Operating & Capital Budgets (*see October 13, 2021 Regular Meeting Package*)  
  
“...moves to adopt the 2022 Operating and Capital Budgets as approved in the October 13, 2021 regular Commission meeting”
4. Ratification of 2017-2020 Updated Strategic Plan  
  
“...moves to ratify the 2021 to 2024 BVRTSC Strategic Plan as presented, with a progress update to be provided to the new Board prior to year-end”
5. Appointment of Avail Chartered Accountants for Audit of 2021 Financials  
  
“...moves to accept Avail Chartered Accountants as the Chartered Accountants for the BVRTSC 2021 financial audit”
6. Setting Dates and Location of Meetings until the 2022 AOM  
  
“...moves that for 2022, the Commission will continue with regular meetings on the 2<sup>nd</sup> Wednesday of every month at 2pm via Zoom or in person as safety protocols permit”
7. Adjournment

# Bow Valley *Regional* Transit Services Commission



## 2021-24 Strategic Plan



**BOW VALLEY REGIONAL  
TRANSIT SERVICES COMMISSION**

# STRATEGIC AND BUSINESS PLAN 2021-2024



Approved October 2020

**DATE**

October 2020

**PUBLISHER**

Bow Valley Regional Transit Commission

Version 1.2



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# I. INTRODUCTION

The Bow Valley Regional Transit Services Commission (BVRTSC) is composed of three voting members (Town of Banff, Town of Canmore and Improvement District No. 9). It was formed with the objective of providing or coordinating local and regional transit services within the regional service area. The Commission is supported by administration staff from the towns of Banff and Canmore and from ID9. As well, Parks Canada actively participates in commission meetings.

The voting members and Parks Canada recognize the importance of public transit as an essential service. Public transit contributes by reducing greenhouse gas emissions, reducing traffic congestion and providing transportation options for the Bow Valley's diverse residents and visitors.

This plan is intended to provide guidance on the continuing development, growth and operation of the Bow Valley Regional Transit Service Commission and Roam Transit for the years 2021 to 2024 inclusive. It has been updated to incorporate direction for dealing with COVID-19.

The plan details the Strategic Direction from each active partner, the Mission Statement of the BVRTSC, and the Elements of a Transit System. Under each element, the plan describes the intended outcome for 2024 and shows the tasks needed to achieve that outcome.

# 2. STRATEGIC DIRECTION

Members of the Bow Valley Regional Transit Services Commission (Banff, Canmore and ID9) and Parks Canada have embraced broad Triple Bottom Line objectives – social, economic and environmental - that support the long term sustainability of the region. Each party has articulated Strategic Direction that has guided the preparation of this plan. As well, the Commission has adopted guiding principles for BVRTSC's response to the COVID-19 pandemic.

## 2.1 Covid-19 Guiding Principles

THE BVRTSC HAS IDENTIFIED THE FOLLOWING PRINCIPLES TO GUIDE THE MANAGEMENT OF THE ORGANIZATION DURING THE PANDEMIC:

1

### **Ensure safety for our:**

- Staff
- Riders

2

### **Provide service for (in order) our:**

- Essential service workers
- Residents
- Visitors

3

### **Fiscal Responsibility**

- Continue charging fares on revenue producing routes with safety initiatives and procedures in place
- Continue making sound purchasing decisions
- Secure alternate revenue sources through hotel partnerships and government programs
- Preserve reserves, by modifying route frequency.

4

### **Maintain current strategic plan goals that are achievable with COVID-19 limitations, and review strategic plan goals moving forward.**



## 2.2 Strategic Direction from Banff

### THE BANFF COMMUNITY PLAN HAS IDENTIFIED SPECIFIC TRANSPORTATION GOALS AND OBJECTIVES:

#### Goals:

- Provide a transportation system that encourages and complements pedestrian movement and cycling.
- Provide a transportation system that enhances the resident and visitor experience
- Encourage the integration of local and regional transportation of people and goods.
- Provide a transportation system that is economically and environmentally sustainable.

#### Objectives:

- Make transit services more convenient and comfortable.
- Reduce and manage traffic volume and parking needs downtown.
- Pursue a regional transportation plan that introduces public transit links between Canmore, Banff, Lake Louise, the surrounding ski areas and popular national park destinations or trail heads.
- Establish and maintain high-quality service standards.
- Transition towards 100% renewable energy for the Banff routes.
- Improve bus travel time relative to vehicle travel time.
- Reduce congestion and parking issues throughout the Bow Valley by enhancing opportunities for people to travel without private vehicles between Calgary and the Bow Valley.
- Continue to work with partners to expand bus services:
  - » Between Calgary and the Bow Valley
  - » Throughout the Bow Valley

The **Town of Banff's Transportation Master Plan** emphasizes public transit as a key approach to improving Banff's overall transportation situation. It recommends consideration of bus stop visual profile, bus livery, routing and frequency. It includes the provision of an intercept ("Park 'n Ride") parking facility or facilities as a long-term recommendation.

Banff Council's **Four-Year Strategic Priorities** (to 2022 inclusive) include the following intended outcomes by 2022:

- Double (to 700,000 riders) summer ridership (June to September) on Banff local routes of the Roam Public Transit service
- Increase year-round ridership by 60% (to 1.18 million) on Banff local routes of the Roam Transit service.
- Expand Calgary-Banff bus service to run every day in the summer (now approved for 2021 with Council)

## 2.3 Strategic Direction from Canmore

**CANMORE'S 2019-2024 BUDGET AND BUSINESS PLAN IDENTIFIES CONTINUED SUPPORT FOR TRANSIT TO SERVE THE COMMUNITY AND ENHANCE QUALITY OF LIFE BY PROVIDING AN AFFORDABLE TRANSPORTATION OPTION AND DECREASING TRAFFIC CONGESTION AND PARKING DEMAND IN THE TOWN CENTRE.**

Canmore's **Integrated Transportation Plan**, approved by Council in 2018, sets a goal of reaching 5% of summer trips around the Town Centre happening by transit by 2030. It identifies walking, cycling and transit as critical components of a complete transportation system within the community, and identifies mode shift as the most effective means of addressing congestion and accommodating future growth.

In 2016, Canmore updated its **Municipal Development Plan**, which contains the following provisions:

- Operation of regional and local public transit systems that serve visitors and residents will be supported by the Town
- Facilities to accommodate expansion of the public transit system should be considered in new development proposals
- Promoting walking, cycling, and transit use through education, incentives, and high-quality infrastructure and services.
- Meeting infrastructure requirements (well-connected to walking and cycling facilities)
- Providing information of travel options to residents and visitors
- Providing amenities such as shelters, lighting, benches, and bicycle parking at transit stops
- Service allocation policy to provide reasonable coverage of the community and access to transit. The priority is on developing utilization of the system and development of transit ridership. The social, environmental and financial benefits of a transit service will be greater with higher community transit ridership than simply community coverage.
- Transit service should meet the broad needs of the community for both residents and visitors.
- Provision of mobility hubs (areas that integrate different modes of travel including walking, cycling, local and regional transit).
- Consideration and support for future regional transit connections between the Bow Valley and Calgary.

**In order to reach the ITP mode share targets, the Town will work to achieve:**

- 3% transit mode share by 2025
- 5% transit mode share by 2030

**In addition to these guiding documents, the Town of Canmore envisions a transit system that offers:**

1. **Fast, frequent, reliable transit service, through:**
  - Make transit services more convenient and comfortable.
  - Reduce and manage traffic volume and parking needs downtown.
2. **Equity and accessibility, through:**
  - Providing comfortable, complete and connected infrastructure and service that consider user experience and affordability, offer opportunities for persons with disabilities to use conventional transit for a portion of their journeys, and work towards integration with other service delivery options and technologies.
3. **A means of minimizing our impact on climate change by reducing our carbon footprint, through:**
  - Mode shift
  - A phased strategy for application of low carbon energy technology for fleet and transit facilities

## 2.4 Strategic Direction from ID9

**ID9 COUNCIL REMAINS COMMITTED TO PROVIDING ECONOMICALLY RESPONSIBLE TRANSIT SERVICES BETWEEN LAKE LOUISE & BANFF, AND THROUGHOUT ID9, TO HELP RESIDENTS AND VISITORS EXPERIENCE THIS UNIQUE DESTINATION.**

ID9 Council has identified the following five priorities which will guide their decision making over the next four years:

1. Decrease traffic congestion & parking related issues
2. Provide a transportation system that is economically sustainable
3. Maintain an affordable service for ID9 residents
4. Offer a reliable service focusing on optimizing schedule adherence
5. Reduce our carbon footprint

## 2.5 Strategic Direction from Parks Canada

Parks Canada will continue to strongly support the operation and expansion of public transit within and adjacent to Banff National Park. Public transit will continue to be an important tool in park management, sustainability, managing demand and addressing visitor infrastructure capacity challenges at select locations in Banff National Park. Parks Canada recognizes the contribution of public transit to enhanced visitor experience, to improved ecological conditions and to reducing carbon footprints.





# MISSION STATEMENT

*"As an essential service, we operate, enhance and grow our regional transit system through innovative and efficient transportation solutions, to ensure that residents and visitors are able to live, work and play in the Bow Valley without the use of a private vehicle."*

## 4. ELEMENTS

4.1

**Governance**

4.2

**Legal Authority  
ad Policy**

4.3

**Human Resources**

4.4

**Transit Service**

4.5

**Infrastructure**

4.6

**Fleet**

4.7

**Technology**

4.8

**Marketing and  
Communication  
Services**

4.9

**Fare System**

4.10

**Financial System**

4.11

**Performance  
Monitoring**



## 4.1 Governance

*The Governance section defines the role of the Commission and establishes the authority to make decisions and policy, which includes the authority to:*

- Establish and update an Operating Bylaw
- Continue to employ, oversee and support a CAO
- Create and approve a Strategic and Business Plan
- Approve Operating Budget
- Approve Capital Budget
- Annually assess the state of the Business Plan, Operating Budget and Capital Budget.
- Conduct Commission self-assessment as required
- Work with member municipalities and other partners to ensure effective and efficient transit and advocate for complementary strategies

### 2024 OUTCOME:

In 2024, we continue to have a structure that gives appropriate voice to the members and provides appropriate direction to Administration.

### TASKS:

GOV 1:	Create and approve a 4-year Strategic and Business Plan and review it annually
GOV 1A:	Convene the next major strategic planning session in the spring of 2024, targeting completion by fall.
GOV 2:	Review and approve annual operating (3-year rolling) and capital (10-year rolling) budgets.
GOV 3:	Annually establish CAO's goals, conduct their annual performance evaluation, and receive feedback from CAO.
GOV 4:	As a standard item on AGM agenda, offer to review wording and content of Operating Bylaw.
GOV 5:	As a standard item on AGM agenda, offer to conduct Commission board self-assessment, reviewing Board effectiveness and planning for improvement.
GOV 5A:	Create simpler board self-assessment tool.
GOV 6:	Update and improve board orientation process.
GOV 7:	Document quarterly review and annual reconciliation of financial results.
GOV 8:	Develop a procedure to review every bylaw and policy once per term.



## 4.2 Legal Authority and Policies

*The Legal Authority and Policy section establishes the BVRTSC's operating authority for fare collection, bus stops, passenger behavior, etc. as well as rule infraction penalties. The development, maintenance and review of an Administration Policy and Procedure Manual is required to guide the administration and operations of the transit service provided by the BVRTSC.*

### 2024 OUTCOME:

In 2024, our legal authority and policies are documented and are appropriate to allow delivery on our mandate.

### TASKS:

LAP 1:	If necessary, develop a Transit Bylaw to assign authority and penalties for fare collection, bus stops, passenger behavior enforcement, etc.
LAP 2:	Continue to update Transit Policy and Procedures Manual.
LAP 3:	If the Commission wishes to expand to include other forms of sustainable transportation, is that permissible under the documents that establish the Commission? If not, what is the change process?
LAP 4:	Consolidate and review the policies directing senior management – determine gaps, if any.
LAP 5:	Do a compliance check with all legal authorities in our territory (federal, provincial, municipal).

## 4.3 Human Resources

*The work of the BVRTSC is accomplished through people. As the transit service continues to develop, the Human Resources required to grow, enhance and operate BVRTSC will change.*

### 2024 OUTCOME:

In 2024, we have the appropriate number of trained and skilled people in place to deliver on our goals. Our staff demonstrate their job satisfaction through low turnover rates, high return rates/desire to return, and exemplary customer service.

### TASKS:

HR 1:	Continue to develop and update Organization Chart, showing how staffing levels would change with growth.
HR 2:	Develop HR plans, structures and policies to allow for growth.
HR 3:	Create and maintain a development/resilience plan for key administrative positions including cross-training, upgrading, succession.
HR 4:	Ensure staff retention and morale by developing and implementing policies on wages & benefits.
HR 4A:	Ensure staff retention and morale through staff recognition/appreciation and staff events, communication, documented annual performance reviews.
HR 5:	Develop a professional development/training plan, possibly to include Banff Ambassador program.
HR 6:	Investigate pension flexibility, to see whether it is possible to offer a choice between LAPP defined benefit plan and RRSP contributions.
HR 7:	Plan for potential staff housing requirement due to growth.
HR 8:	Develop a CAO remuneration policy.
HR 9:	Develop an off-boarding process for all staff, including exit interview.
HR 10:	Develop an on-boarding process for admin staff.

### TASKS FROM PREVIOUS PLAN, NOW EITHER COMPLETED OR NO LONGER REQUIRED:

HR 6:	Consider a volunteer transit host program, similar to the ski host program, with free transit passes for volunteers.
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## 4.4 Transit Service

*Transit services follow a lifecycle pattern of feasibility study, route and service implementation and operation, ridership and performance monitoring, and ongoing service adjustments. For proposed new routes, a feasibility study examines the community geography, visitor usage and visitation patterns, urban form, road pattern, population and employment distribution to develop the most effective route structure, span of service, service frequency, capital and operating costs, and potential ridership and revenue.*

### 2024 OUTCOME:

In 2024, popular Bow Valley destinations are fully connected, year-round, by public transit. For the rider, the system is efficient, seamless, integrated and easy to understand. The transit service includes, but is not limited to, Banff, Canmore and Lake Louise local routes, Banff-Canmore and Banff-Lake Louise regional routes, and service to Lake Minnewanka loop and the Bow Valley Parkway. Target 1.18 million riders on local routes in Banff. Three per cent of summer trips in Canmore use transit.

### TASKS:

TS 1:	Overall system review – Roam plus other transportation providers, how does it all work together?
TS 2:	Draft for commission approval and recommendation to the partners a policy to allow the Administrative Lead to make service adjustments (+/- 10% service hours) for operational needs without prior approval of the Contributing Partner(s).
TS 3:	Consider new partners as/when those partners commit to contribution.
TS 4:	Complete study exploring provision of on demand service for the severely disabled
TS 5:	Re-establish partnership on Banff Centre route.
TS 6:	Innovation: investigate our relationship with alternative modes (car share, bike share, gondola)
TS 7:	Conduct system review meetings with all potential partners in the area. Look for opportunities for integration, to give riders one-stop shopping.
TS 8:	Review contribution agreements with Parks Canada and renew agreements as possible.
TS 9:	Identify the metrics for each route. Review and optimize all existing routes with regard to the strategic direction from the commission.
TS 10:	Investigate all new route opportunities within our mandate. Start with discussions with partners, then map out opportunities and create plan for roll-out.
TS 11:	Continue to expand Roam's involvement in Lake Louise local service
TS 12:	Explore on-demand service options to reach outlying areas.
TS 13:	Advocate for, advise on and champion disincentives to private vehicle use.



**TASKS FROM PREVIOUS PLAN, NOW EITHER COMPLETED OR NO LONGER REQUIRED:**

TS 2:	Prepare and negotiate annual contracts for Parks Cave & Basin s ervice.
TS 3:	Implement transit service to Moraine Lake and Upper Lake Louise from Lake Louise village.
TS 4:	Implement Canmore local service.
TS 5:	Implement Banff – Lake Louise regional service.
TS 6:	Implement service from Banff to Lake Minnewanka.
TS 7:	Work with ski area partners to deliver integrated service to ski hills. (replaced by TS 16)
TS 8:	Undertake feasibility study for summer/winter service to campgrounds and trailheads.
TS 9:	Undertake feasibility study for connection to Calgary Transit.
TS 13:	Investigate possible options for expansion of bike carrying program.

## 4.5 Infrastructure

*Transit systems require fixed infrastructure to facilitate the safe and effective movement of people and vehicles, and cleaning, fueling and maintenance facilities to ensure the fleet is available over the effective asset life. These include:*

- Bus stops
- Passenger shelters
- Bike racks – on vehicle, trailer, at bus stops
- Signage
- Bus loops
- Transit Exchanges / Transfer Stations – Banff, Canmore, Lake Louise
- Park & Ride lots
- Fueling, Cleaning and Light Maintenance
- Storage, Cleaning and Maintenance Facilities
- Customer Service Centre with adequate capacity for a board room and functional staff spaces

At present, members provide capital funding to the Commission, and the Commission also applies for appropriate grants and funding from other sources. When additional transit infrastructure is needed, the Commission allocates capital funds to the municipality in which the project is being built, and that municipality manages the project and follows its own development standards and bylaws in delivering the project. All completed infrastructure is owned and maintained by the member municipality within which the infrastructure is located. The Commission replaces bus stop signage as required.

### 2024 OUTCOME:

In 2024, we have sufficient and appropriate infrastructure in place to support operations and the growth contemplated in this plan.

### TASKS:

INF 1:	Work with Parks Canada on a Lake Louise Transit Exchange.
INF 2:	Implement a consistent visual identity for Roam bus stops, passenger shelters and signage. This does not mean that every bus stop will be exactly the same, but it does mean that consistent elements will make the stops easily recognizable for users.
INF 3:	Explore and champion transit priority infrastructure.
INF 4:	Plan for new infrastructure if needed for growth.





**TASKS FROM PREVIOUS PLAN, NOW EITHER COMPLETED OR NO LONGER REQUIRED:**

INF 1:	Develop a concept plan and budget for a downtown Banff Transit Exchange.
INF 3:	Define Infrastructure Responsibility - Review and formalize a policy on the distribution of infrastructure design, construction and maintenance responsibilities between Commission and Municipalities.
INF 4:	Develop Bus Facility Plan for the Region - Develop a 5-year bus fueling, storage, cleaning and maintenance facility plan.



## 4.6 Fleet

*Ensuring an appropriate fleet of buses is acquired, maintained and available for service is fundamental to the success of the BVRTSC transit service. Our goal is to have a low-emission fleet.*

### 2024 OUTCOME:

In 2024, we have sufficient and appropriate well-maintained buses and spares to meet service requirements.

### TASKS:

FL 1:	Maintain a 10-year rolling Fleet Plan identifying the timing and cost of the acquisition, refurbishment and disposal of each bus, planning for maintenance of service and for growth. Update budget with regard to grant availability/probability.
FL 2:	Bus Specifications - Continue to investigate fleet options with regard to best practices in new technologies, sustainability and accessibility.

### TASKS FROM PREVIOUS PLAN, NOW EITHER COMPLETED OR NO LONGER REQUIRED:

FL 3:	Convert, as required, buses to bilingual.
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## 4.7 Technology

*The use of appropriate technology can improve the safety and functionality of transit systems. Electronic fare collection, Smart Card fare systems, automatic vehicle location (AVL/arrival prediction) and on-board operator/vehicle safety (Drive Cam) systems are examples of common technologies currently used to improve transit system operations.*

### 2024 OUTCOME:

In 2024, we use up-to-date technology to make our customer experience convenient and hassle-free, and to make our performance tracking accurate and efficient.

### TASKS:

TEC 1:	Add arrival prediction displays at major bus stops and improve accuracy of arrival prediction displays.
TEC 2:	Add more on-board Wi-Fi.
TEC 3:	Improve app.
TEC 4:	Promote and install technology to deliver more transit information to customers in secondary locations, such as hotel lobbies, etc., when hotels are ready.
TEC 5:	Ensure latest technology is available/used for tracking ridership and other key performance indicators.
TEC 6:	Explore multilingual customer interface.
TEC 7:	Explore options for more efficient boarding @ crunch locations, including passenger queueing, how to get on/off, ticket vending machines.
TEC 8:	Continue to investigate individual technology to deliver messages (area information) to riders on visitor-focused routes.

### TASKS FROM PREVIOUS PLAN, NOW EITHER COMPLETED OR NO LONGER REQUIRED:

TEC 1:	Expand smart card system and allow for mobile ticketing and online card purchase/renewal.
TEC 6:	Explore ticketless boarding.
TEC 8:	Investigate GyPSy system or similar on buses.

## 4.8 Marketing and Communication Services

*How a transit system markets services and communicates with the public is fundamentally important to developing ridership and maintaining good community relations. Efforts in this regard should include:*

- Customer Information – print, website, telephone, etc.
- Stakeholder / Public Consultation
- Marketing Plan
- Advertising / Promotion
- Branding and brand management

### **2024 OUTCOME:**

In 2024, we ensure that users, non-users, partners and senior levels of government know about Bow Valley Regional Transit Services Commission and Roam.

### **TASKS:**

MCS 1:	Update our online presence - use all new means to keep current.
MCS 2:	Make a formal presentation at least once annually to each partner council.
MCS 3:	Continue to build relationships at the federal and provincial levels to ensure that BVRTSC is understood.
MCS 4:	Update and implement Marketing Plan to increase levels of awareness among visitors, and increase ridership and mode share. Define how we will position, advertise and promote our services in the local, regional and national/international markets.
MCS 5:	Define policy for how we will contribute to community events and initiatives, including how we will communicate about our contributions.
MCS 6:	Evaluate and review Roam brand standard for currency and effectiveness.
MCS 7:	Finalize transfer of Brand Standard from Town of Banff to the BVRTSC
MCS 8:	Investigate multilingual communication and provide bilingual service as required.
MCS 9:	Develop and implement PSA program on buses (wildlife safety, etc.) Five messages, three languages.
MCS 10:	Continue to produce hard-copy communications.
MCS 11:	Advocate for disincentives to private vehicle use.





**TASKS FROM PREVIOUS PLAN, NOW EITHER COMPLETED OR NO LONGER REQUIRED:**

MCS 5:	Implementation of Marketing Plan.
MCS 8:	Develop more robust route schedule information system to improve beyond the current pdf presentation.



## 4.9 Fare System

*Transit authorities are normally required to establish a fare system that generates revenue equivalent to a set percentage of operating costs through charging for services. The fare system is composed of:*

- Fare Medium – Cash, bills, tickets, passes, Smartcards, etc.
- Fare structure and revenue recovery policies.
- Fare Pricing Policy – Regular fares, Concession fares (child, senior, low income, etc.)
- Revenue Collection / Management

### 2024 OUTCOME:

In 2024, our fare structure is sustainable, encourages ridership and meets the needs of partners. More profitable routes subsidize others, within the requirements of the partnership structure.

### TASKS:

FS 1:	Review fares annually, checking against Commission's and partners' relative valuing of ridership vs. revenue and cost reduction vs. frequency.
FS 2:	Explore opportunities for and advocate for free-to-user public transit, where it works for the partners.
FS 3:	Conduct formal fare review like the one in 2018.

### TASKS FROM PREVIOUS PLAN, NOW EITHER COMPLETED OR NO LONGER REQUIRED:

FS 1:	Explore implications of varying fees across the system, with some routes free, some inexpensive, some more expensive. Start with the exploration of zoned fares.
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## 4.10 Financial System

*Fundamental to the ongoing success of any business is the establishment of a financial system with sound policies and processes. The BVRTSC Operating Bylaw establishes the fundamental aspects of the ROAM Transit financial system. Essential elements include;*

- Operating Bylaw, Clause 11 (Financial)
- Operating Budget – Annual and Three Year Rolling Financial Plan
  - » Expenditures by Major Categories
    - Annual direct operating costs for each service
    - Marketing costs
  - » Revenue from Fares, Advertising, Municipal Contributions, Private (Hotel Partners) Contributions
- Capital Budget – 10 Year Plan
  - » Acquisition of Capital Assets (Fleet, Infrastructure, Technology) identified by year
  - » Contributions from Private, Municipal, Provincial and Federal sources.
    - Capital Reserve Fund
- Cost and Revenue Sharing Principles / Cost Allocation Methodology -- Operating Bylaw Schedule A
- Audit Process – Operating Bylaw Clause 5.6

### 2024 OUTCOME:

In 2024, all contributors feel fairly treated by an equitable contribution system that is transparent to all. BVRTSC is appropriately supported by contributing partners and federal and provincial governments in a manner that allows smart, sustainable growth within our capacity.

### TASKS:

FIN 1:	Annual Financial Audit
FIN 2:	Annual Capital Grant Review – investigate access to capital grants from higher orders of government.
FIN 3:	Operating and Capital Budget Reserve Policy -- investigate policies and update if necessary, in light of changing grant availability and growth.
FIN 4:	Excess Operating Revenue Policy - investigate policy and update if necessary.
FIN 5:	Prepare a rolling 10-year Capital Plan to reflect the goals of this Plan.
FIN 6:	Review capital amortization schedule and assumptions.

### TASKS FROM PREVIOUS PLAN, NOW EITHER COMPLETED OR NO LONGER REQUIRED:

FIN 1:	Review Funding Methodology/Formula -- take into account congestion reduction and movement benefits.
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## 4.11 Performance Monitoring

*The ongoing performance monitoring of customer satisfaction and operational performance is important to ensuring the service is both effective and efficient.*

### 2024 OUTCOME:

In 2024, we are able to assure contributing partners of the efficiency and effectiveness of the transit service. Our tracking of key performance indicators allows us to quickly identify and take action on areas for improvement.

### TASKS:

PM 1:	Identify targets for all key performance indicators for all routes (overhead per service hour, amortization per service hour, net cost per service hour per route, % capacity used on buses, number of over-full buses, ridership per service hour per route, fuel consumption per service hour, mode share per route, percentage cost recovery per service hour). Prioritize these targets into high, medium and low priorities for each route.
PM 2:	Track all performance indicators.
PM 3:	Annually review performance indicators, targets and priority levels to ensure that they are still appropriate.
PM 4:	Work with CUTA calculations and partners to calculate environmental benefit based on ridership and fuel consumption per service hour.
PM 5:	Quarterly report individual Route Performance to the Commission.
PM 6:	Annually report and present on Roam Transit system performance to each member Council. This annual report will highlight overall performance plus performance on the strategic directions identified by the individual partners.
PM 7:	Report as required by grantors on government grant funding received.
PM 8:	Compare our performance to the stats and best practices for other tourism destinations, for the information of the Commission board members and the contributing partner councils.
PM 9:	Try to quantify the number of cars off the road because of transit.





# 5.TIMELINE

## GOVERNANCE

Task #	Task Description	2021-22	2023	2024
GOV 1	Create and approve a 4-year Strategic and Business Plan and review it annually			
GOV 2	Review and approve annual operating (3-year rolling) and capital (10-year rolling) budgets.			
GOV 3	Annually establish CAO's goals, conduct their annual performance evaluation, and receive feedback from CAO.			
GOV 4	As a standard item on AGM agenda, offer to review wording and content of Operating Bylaw.			
GOV 5	As a standard item on AGM agenda, offer to conduct Commission board self-assessment, reviewing Board effectiveness and planning for improvement.			
GOV 5A	Create simpler board self-assessment tool.			
GOV 6	Update and improve board orientation process.			
GOV 7	Document quarterly review and annual reconciliation of financial results.			
GOV 8	Develop a procedure to review every bylaw and policy once per term.			

## LEGAL AUTHORITY AND POLICY

Task #	Task Description	2021-22	2023	2024
LAP 1	If necessary, develop a Transit Bylaw to assign authority and penalties for fare collection, bus stops, passenger behavior enforcement, etc.			
LAP 2	Continue to update Transit Policy and Procedures Manual.			
LAP 3	If the Commission wishes to expand to include other forms of sustainable transportation, is that permissible under the documents that establish the Commission? If not, what is the change process?			
LAP 4	Consolidate and review the policies directing senior management – determine gaps, if any.			
LAP 5	Do a compliance check with all legal authorities in our territory (federal, provincial, municipal).			

## HUMAN RESOURCES

Task #	Task Description	2021-22	2023	2024
HR 1	Continue to develop and update Organization Chart, showing how staffing levels would change with growth.			
HR 2	Develop HR plans, structures and policies to allow for growth.			
HR 3	Create and maintain a development/resilience plan for key administrative positions including cross-training, upgrading, succession.			
HR 4	Ensure staff retention and morale by developing and implementing policies on wages & benefits.			
HR 4A	Ensure staff retention and morale through staff recognition/appreciation and staff events, communication, documented annual performance reviews.			
HR 5	Develop a professional development/training plan, possibly to include Banff Ambassador program.			
HR 6	Investigate pension flexibility, to see whether it is possible to offer a choice between LAPP defined benefit plan and RRSP contributions.			
HR 7	Plan for potential staff housing requirement due to growth			
HR 8	Develop a CAO remuneration policy			
HR 9	Develop an off-boarding process for all staff, including exit interview.			
HR 10	Develop an on-boarding process for admin staff.			

## TRANSIT SERVICE

Task #	Task Description	2021-22	2023	2024
TS 1	Overall system review – Roam plus other transportation providers, how does it all work together?			
TS 2	Draft for commission approval and recommendation to the partners a policy to allow the CAO to make service adjustments (+/- 10% service hours) for operational needs without prior approval of the Contributing Partner(s)			
TS 3	Consider new partners as/when those partners commit to contribution			
TS 4	Complete study exploring provision of on demand service for the severely disabled			
TS 5	Re-establish partnership on Banff Centre route.			
TS 6	Innovation: investigate our relationship with alternative modes (car share, bike share, gondola)			
TS 7	Conduct system review meetings with all potential partners in the area. Look for opportunities for integration, to give riders one-stop shopping.			
TS 8	Review contribution agreements with Parks Canada and renew agreements as possible.			
TS 9	Identify the metrics for each route. Review and optimize all existing routes with regard to the strategic direction from the commission.			
TS 10	Investigate all new route opportunities within our mandate. Start with discussions with partners, then map out opportunities and create plan for roll-out			
TS 11	Continue to expand Roam's involvement in Lake Louise local service			
TS 12	Explore on-demand service options to reach outlying areas.			
TS 13	Advocate for, advise on and champion disincentives to private vehicle use			



## INFRASTRUCTURE

Task #	Task Description	2021-22	2023	2024
INF 1	Work with Parks Canada on a Lake Louise Transit Exchange.			
INF 2	Implement a consistent visual identity for Roam bus stops, passenger shelters and signage. This does not mean that every bus stop will be exactly the same, but it does mean that consistent elements will make the stops easily recognizable for users.			
INF 3	Explore and champion transit priority infrastructure.			
INF 4	Plan for new infrastructure if needed for growth.			

## FLEET

Task #	Task Description	2021-22	2023	2024
FL 1	Maintain a 10-year rolling Fleet Plan identifying the timing and cost of the acquisition, refurbishment and disposal of each bus, planning for maintenance of service and for growth. Update budget with regard to grant availability/probability.			
FL 2	Bus Specifications - Continue to investigate fleet options with regard to best practices in new technologies, sustainability and accessibility			

## TECHNOLOGY

Task #	Task Description	2021-22	2023	2024
TEC 1	Add Arrival prediction displays at major bus stops and improve accuracy of Arrival prediction displays.			
TEC 2	Add more on-board wifi.			
TEC 3	Improve app.			
TEC 4	Promote and install technology to deliver more transit information to customers in secondary locations, such as hotel lobbies, etc., when hotels are ready.			
TEC 5	Ensure latest technology is available/used for tracking ridership and other key performance indicators.			
TEC 6	Explore multilingual customer interface.			
TEC 7	Explore options for more efficient boarding @ crunch locations, including passenger queueing, how to get on/off, ticket vending machines.			
TEC 8	Continue to investigate individual technology to deliver messages (area information) to riders on visitor-focused routes.			



## MARKETING AND COMMUNICATIONS SERVICES

Task #	Task Description	2021-22	2023	2024
MCS 1	Update our online presence - use all new means to keep current.			
MCS 2	Make a formal presentation at least once annually to each partner council.			
MCS 3	Continue to build relationships at the federal and provincial levels to ensure that BVRTSC is understood.			
MCS 4	Update and implement Marketing Plan to increase levels of awareness among visitors and increase ridership and mode share. Continue to refine how we will position, advertise and promote our services in the local, regional and national/ international markets.			
MCS 5	Define policy for how we will contribute to community events and initiatives, including how we will communicate about our contributions			
MCS 6	Evaluate and review Roam brand standard for currency and effectiveness.			
MCS 7	Finalize transfer of Brand Standard from Town of Banff to the BVRTSC.			
MCS 8	Investigate multilingual communication.			
MCS 9	Develop and implement PSA program on buses (wildlife safety, etc.) Five messages, three languages.			
MCS 10	Continue to produce hard-copy communications			
MCS 11	Advocate for disincentives to private vehicle use.			

## FARE SYSTEM

Task #	Task Description	2021-22	2023	2024
FS 1	Review fares annually, checking against Commission's and partners' relative valuing of ridership vs. revenue and cost reduction vs. frequency.			
FS 2	Explore opportunities for and advocate for free-to-user public transit, where it works for the partners.			
FS 3	Conduct formal fare review like the one in 2018.			

## FINANCIAL

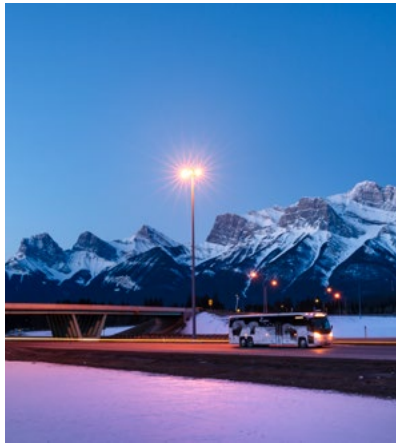
Task #	Task Description	2021-22	2023	2024
FIN 1	Annual Financial Audit.			
FIN 2	Annual Capital Grant Review – investigate access to capital grants from higher orders of government.			
FIN 3	Operating and Capital Budget Reserve Policy -- investigate policies and update if necessary, in light of changing grant availability and growth.			
FIN 4	Excess Operating Revenue Policy - investigate policy and update if necessary.			
FIN 5	Prepare a rolling 10-year Capital Plan to reflect the goals of this Plan.			
FIN 6	Review capital amortization schedule and assumptions.			

## PERFORMANCE MONITORING

Task #	Task Description	2021-22	2023	2024
PM 1	Identify targets for all key performance indicators for all routes (overhead per service hour, amortization per service hour, net cost per service hour per route, % capacity used on buses, number of over-full buses, ridership per service hour per route, fuel consumption per service hour, mode share per route, percentage cost recovery per service hour). Prioritize these targets into high, medium and low priorities for each route.			
PM 2	Track all performance indicators.			
PM 3	Annually review performance indicators, targets and priority levels to ensure that they are still appropriate.			
PM 4	Work with CUTA calculations and partners to calculate environmental benefit based on ridership and fuel consumption per service hour.			
PM 5	Quarterly, report individual Route Performance to the Commission.			
PM 6	Annually report and present on Roam Transit system performance to each member Council. This annual report will highlight overall performance plus performance on the strategic directions identified by the individual partners.			
PM 7	Report as required by grantors on government grant funding received.			
PM 8	Compare our performance to the stats and best practices for other tourism destinations, for the information of the Commission board members and the contributing partner councils.			
PM 9	Develop a metric to quantify the number of cars off the road because of transit.			









## 6.TASKS BY YEAR

### ANNUAL

- GOV 1: Create and approve a 4-year Strategic and Business Plan and review it annually.
- GOV 1a: Convene the next major strategic planning session in the spring of 2024, targeting completion by fall.
- GOV 2: Review and approve annual operating (3-year rolling) and capital (10-year rolling) budgets.
- GOV 3: Annually establish CAO's goals, conduct their annual performance evaluation, and receive feedback from CAO.
- GOV 4: As a standard item on AGM agenda, offer to review wording and content of Operating Bylaw.
- GOV 5: As a standard item on AGM agenda, offer to conduct Commission board self-assessment, reviewing Board effectiveness and planning for improvement.
- FL 1: Maintain a 10-year rolling Fleet Plan identifying the timing and cost of the acquisition, refurbishment and disposal of each bus, planning for maintenance of service and for growth. Update budget with regard to grant availability/probability.
- MCS 2: Make a formal presentation at least annually to each partner council.
- FS 1: Review fares annually, checking against Commission's and partners' relative valuing of ridership vs. revenue and cost reduction vs. frequency.
- FIN 1: Annual Financial Audit
- FIN 2: Annual Capital Grant Review – investigate access to capital grants from higher orders of government.
- FIN 5: Prepare a rolling 10-year Capital Plan to reflect the goals of this Plan.
- PM 3: Annually review performance indicators, targets and priority levels to ensure that they are still appropriate.
- PM 6: Annually report and present on Roam Transit system performance to each member Council. This annual report will highlight overall performance plus performance on the strategic directions identified by the individual partners.
- PM 8: Compare our performance to the stats and best practices for other tourism destinations, for the information of the Commission board members and the contributing partner councils.

## CONTINUOUS

GOV 7:	Document quarterly review and annual reconciliation of financial results.
LAP 2:	Continue to update Transit Policy and Procedures Manual.
HR 1:	Continue to develop and update Organization Chart, showing how staffing levels would change with growth.
HR 4a:	Ensure staff retention and morale through staff recognition/appreciation and staff events, communication, documented annual performance reviews.
TS 6:	Innovation: investigate our relationship with alternative modes (car share, bike share, gondola)
TS 9:	Identify the metrics for each route. Review and optimize all existing routes with regard to the strategic direction from the commission.
TS 13:	Advocate for, advise on and champion disincentives to private vehicle use.
INF 3:	Explore and champion transit priority infrastructure.
FL 2:	Bus Specifications - Continue to investigate fleet options with regard to best practices in new technologies, sustainability and accessibility.
TEC 1:	Add arrival prediction displays at major bus stops and improve accuracy of arrival prediction displays.
TEC 2:	Add more on-board Wi-Fi.
TEC 3:	Improve app.
TEC 5:	Ensure latest technology is available/used for tracking ridership and other key performance indicators.
MCS 1:	Update our online presence - use all new means to keep current.
MCS 3:	Continue to build relationships at the federal and provincial levels to ensure that BVRTSC is understood.
MCS 4:	Update and implement Marketing Plan to increase levels of awareness among visitors and increase ridership and mode share. Define how we will position, advertise and promote our services in the local, regional and national/international markets.
PM 2:	Track all performance indicators.
PM 5:	Quarterly report individual Route Performance to the Commission.

## **YEARS 1 AND 2 (2021 - 2022)**

- GOV 5A: Create simpler board self-assessment tool.
- GOV 6: Update and improve board orientation process.
- LAP 3: If the Commission wishes to expand to include other forms of sustainable transportation, is that permissible under the documents that establish the Commission? If not, what is the change process?
- HR 2: Develop HR plans, structures and policies to allow for growth.
- HR 3: Create and maintain a development/resilience plan for key administrative positions including cross-training, upgrading, succession.
- HR 4: Ensure staff retention and morale by developing and implementing policies on wages & benefits.
- HR 8: Develop a CAO remuneration policy.
- TS 1: Overall system review – Roam plus other transportation providers, how does it all work together?
- TS 7: Conduct a system review meeting with all players in the area. Look for opportunities for integration, to give riders one-stop shopping.
- TS 10: Investigate all new route opportunities within our mandate. Start with discussions with partners, then map out opportunities and create plan for roll-out.
- TS 11: Continue to expand Roam’s involvement in Lake Louise local service
- TEC 7: Explore options for more efficient boarding @ crunch locations, including passenger queueing, how to get on/off, ticket vending machines.
- MCS 7: Finalize transfer of Brand Standard from Town of Banff to the BVRTSC.
- FIN 3: Operating and Capital Budget Reserve Policy -- investigate policies and update if necessary, in light of changing grant availability and growth.
- FIN 6: Review capital amortization schedule and assumptions.
- PM 1: Identify targets for all key performance indicators for all routes (overhead per service hour, amortization per service hour, net cost per service hour per route, % capacity used on buses, number of over-full buses, ridership per service hour per route, fuel consumption per service hour, mode share per route, percentage cost recovery per service hour). Prioritize these targets into high, medium and low priorities for each route.
- PM 9: Try to quantify the number of cars off the road because of transit.

### **YEAR 3 (2023)**

- GOV 8: Develop a procedure to review every bylaw and policy once per term.
- LAP 1: If necessary, develop a Transit Bylaw to assign authority and penalties for fare collection, bus stops, passenger behavior enforcement, etc.
- LAP 4: Consolidate and review the policies directing senior management – determine gaps, if any.
- LAP 5: Do a compliance check with all legal authorities in our territory (federal, provincial, municipal).
- HR 5: Develop a professional development/training plan, possibly to include Banff Ambassador program.
- HR 6: Investigate pension flexibility, to see whether it is possible to offer a choice between LAPP defined benefit plan and RRSP contributions.
- HR 9: Develop an off-boarding process for all staff, including exit interview.
- HR 10: Develop an on-boarding process for admin staff.
- TS 2: Draft for commission approval and recommendation to the partners a policy to allow the Administrative Lead to make service adjustments (+/- 10% service hours) for operational needs without prior approval of the Contributing Partner(s).
- TS 5: Get study done to explore provision of on-call service for severely handicapped.
- TS 11: Continue to expand Roam's involvement in Lake Louise local service.
- TS 12: Explore on-demand service options to reach outlying areas.
- TEC 8: Continue to investigate individual technology to deliver messages (area information) to riders on visitor-focused routes.
- MCS 5: Define policy for how we will contribute to community events and initiatives, including how we will communicate about our contributions.
- MCS 6: Evaluate and review Roam brand standard for currency and effectiveness.
- MCS 8: Investigate multilingual communications.
- FS 3: Conduct formal fare review like the one in 2018.
- PM 4: Work with CUTA calculations and partners to calculate environmental benefit based on ridership and fuel consumption per service hour.
- ANNUAL: plus all annual items.
- CONTINUOUS: plus all continuous items.
- AS NEEDED: plus all as needed items.

### **YEAR 4 (2024)**

- GOV 1a: Convene the next major strategic planning session in the spring of 2024, targeting completion by fall.
- ANNUAL: plus all annual items.
- CONTINUOUS: plus all continuous items.
- AS NEEDED: plus all as needed items.









Roam



# Bow Valley *Regional* Transit Services Commission



2019 Year End Auditor

Proposal for external audit and related services for:  
**BOW VALLEY REGIONAL TRANSIT SERVICES COMMISSION**  
for the years ending December 31, 2020 to 2022

**Attention:**  
**c/o:**

**Board of Directors**  
**Martin Bean**  
**Chief Administrative Officer**

Submitted by:

Calvin Scott, CPA, CA, AMSF  
Partner

Avail CPA  
100, 530 8 Street South  
Lethbridge, AB T1J 2J8

October 29, 2020

**Avail** CHARTERED  
PROFESSIONAL  
ACCOUNTANTS



## Thank You

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Thank you for the opportunity to provide a proposal to continue to provide audit and related services for the Bow Valley Regional Transit Commission ("the Commission"). We feel that we have provided great service over the past years as your auditors and advisors and we are confident that our team will continue to meet the expectations set out by your organization. During our time as your auditors we have developed a detailed knowledge of the operations and requirements of your organization, as well as a thorough understanding of the related audit and accounting requirements.

## Audit Requirements

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We understand the request for proposal outlines specific services and needs that are required for this audit, including:

- Annual review of the accounting systems and internal controls of the Commission;
- Audit of the books and records in accordance with Canadian auditing standards;
- Preparation of the corporate style financial statements in accordance with Canadian Public Sector Accounting Standards;
- Preparation of the Financial Information Return (FIR) and auditor's report;
- Preparation of a management letter including our observations related to any internal control weaknesses identified and suggestions for improvement;
- Preparation of the T2 corporate income tax return and related schedules;
- Virtual attendance at a Board or Audit Committee meeting to present the financial statements and audit results;
- Discussions relating to audit, financial, and other routine accounting matters as requested during the year;
- Audit of the Local Authorities Pension Plan.

## Audit Investment and Fees

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As a result of a commitment we made to the Commission in our previous audit proposal, our audit fees to the Commission during this same period did not increase beyond a cost of living factor of 3%. We value the Commission as one of our premiere clients and accordingly we are proposing an annual audit fee for the services identified above at **\$11,500**. We believe that this fee will allow us to provide the highest quality of service at the fairest fee. The breakdown is as follows:

Main Audit	\$ 9,500
LAPP Audit	\$ 2,000

It is our experience that Management will often have minor queries throughout the year and may need some assistance with certain year-end adjusting entries. Time related to dealing with Management for routine queries and adjustments is included in the fee.

The fee proposed would not cover any additional services requested during the year. Other professional services would be billed according to the nature of the work performed and would be discussed and agreed upon prior to the engagement.

## Delivery Dates

Tentative list of delivery dates for the 2020 audit, subject to management input and approval:

Item	Deadline
Interim audit (if needed)	December 15, 2020
Draft trial balance and general ledger provided to auditor	February 15, 2021
Complete set of year-end working papers provided to auditor	February 22, 2021
Audit field work commences	March 1, 2021
Completion of audit field work (including on-site and virtual)	March 3, 2021
Draft Financial Statements and notes to Management	March 12, 2021
Financial Statements and Management Letter discussed with Management and the Board at Exit Conference	April 6, 2021 (determined by Board)
Financial Statements formally approved by the Board	April 13, 2021 (determined by Board)

The audit schedule shall be completed jointly with cooperation with Commission staff each year and approved by Commission management, as necessary. Throughout the audit process Commission management will receive regular email, phone or virtual communication from our team informing you of our audit progress.

## Your audit team

### Engagement Partner – Calvin Scott, CPA, CA, AMSF



Calvin has been with Avail LLP for 20 years and focuses primarily on audit and consulting services for not-for-profit clients. Calvin is the engagement partner for approximately 50 not-for-profits in Southern Alberta, including several public school divisions, municipalities, marketing boards, commissions, and housing organizations. Calvin will provide on-going support to the Commission and will be the main contact with the Board and/or Audit Committee. Calvin is a board member for numerous not-for-profit organizations in Southern Alberta. Calvin is a past board member and Chair of the Finance, Audit and Risk Committee of the Lethbridge College.

### Engagement Manager – Lisa Clarke, CPA, CA



Lisa will be the manager responsible for the conduct of the audit field work and supervision of the audit team. Lisa has many years of experience auditing the municipal, housing and not-for-profit sectors. She will maintain primary contact with your finance personnel responsible for the audit and will provide support to the audit team as needed. Lisa has been with Avail LLP since 2005 and focuses primarily on audit and consulting services for not-for-profit clients.

### Audit In-charge – Ryan Kurtz



Ryan will be responsible for the performance of audit field work either remotely or on site for Commission. Ryan has many years of experience auditing the not-for-profit and public sectors. Ryan recently wrote and the Chartered Professional Accountant exam and is currently awaiting his results. Ryan will also directly supervise any students assigned to assist with the audit field work.

### Administrative Assistant – Amanda Turcato



Amanda will be your go-to for routine queries related to your work, scheduling, meeting coordination, and more. Amanda's eye for detail and experience with other Commissions will bring additional value to your audit. Amanda has worked closely with various audit clients over the past number of years and she is very familiar with the audit specific filing requirements.

### Contact us

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Please don't hesitate to call or email if you have any questions, inquiries or would like to discuss our proposal further. We look forward to the opportunity to continue working with the Commission and its team members.

Thanks again,

A handwritten signature in blue ink, appearing to read 'CS'.

Calvin Scott, CPA, CA, AMSF  
Partner

## Appendix A – Additional Services

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At Avail CPA, we take a unique approach to servicing our clients by providing a positively different experience. We continually work on our systems and techniques to create audit efficiencies, which allow us to spend less time at your location performing audit work and to free up your people to continue doing the important day to day activities that matter to you.

Our quick turnaround time and fee guarantee allow your organization to have the highest quality product, received on time and before the deadline, while ensuring that you've received fair value for your dollar.

Beyond the audit, our team provides a wide array of additional offerings to help your organization be the best it can be. Some of those offerings include:

### Business Consulting – George Virtue, FCPA, FCA, AMSF



As the leader of the Business Consulting group, George brings over 40 years of experience as a not-for profit auditor, a managing partner, and a strategic advisor to his clients. As an Accredited Mindshop Facilitator, George helps good organizations, with engaged leadership, become great. He can help your team implement their vision, strategy, and improvement plans. George will also provide executive coaching, leadership training, strategic planning, management facilitation, and problem solving advisory.

### Indirect Tax Expert - Dan Oler, CPA, CA



Dan invests significant time staying current with both current and complex GST provisions. Should the need arise, Dan will ensure your management group is compliant with the Excise Tax Act and can advise on the best business decisions effecting any GST issues that may arise for the Commission.

### Avail Insight – Nadine Granson, CPA, CA



As the leader of the Avail Insight team, Nadine applies her 30 years of experience to assist non-for-profit clients with a top to bottom review of their organization to help identify opportunities for improvement and help ensure they are operating at their full potential with the Avail Health Check. Nadine will provide a complete review of operations including internal controls, policies and procedures, Board reporting, IT and HR systems, and ensure your organization is in line with industry best practices.



## Human Resources – Kate Miller, CPHA



Our Chartered Professional in Human Resources (CPHR) will assist and focus employers through every step of the employee lifecycle (policy creation/review, hiring, firing, retention, recruitment, compensation, etc.). Let Kate help create a productive and rewarding workplace with increased job satisfaction, production, and profits.

## IT and Process Efficiency – Obed Maurice, CPA, CA



Obed's passion lies in using technology to eliminate the painful parts of accounting and finance for everyone. Obed will help make sure your organization is operating at its most efficient levels with process improvements and automation throughout your organization. His team will also assist in reviewing and assessing your current IT environment to help ensure your organization is safe and protected from IT threats.

## Investment Advisory – Tyler Brack, CPA, CA, CFP®



Our in house Certified Financial Planner, Tyler Brack, can help with an independent review of your organizations current investments and investment policies. Tyler can also review and provide options for employee benefits plans, health spending plans, and employee life insurance options.

Complementary introductory meetings are available with each of the service lines to help identify and assess your needs. Any of these engagements would be billed separately from the quoted amounts in this proposal. References for any service lines are available upon request.