

13

Business Systems & Processes



- › Leading systems and policies to respond to best practices, comply with legislative requirements and deliver sustainable budgets

01 Strategy

STRATEGIES & PLANS

- › CRD Digital, Technology & Data Strategies [in development]
- › Financial Services 2026-2030 Strategic Plan [in development]

CORPORATE PLAN GOALS

- 13a Effective systems, processes & policies
- 13b Business capacity & continuity
- 13c Achieve sustainable budgets through innovation & streamlining while recognizing the need for infrastructure investments & accountability to taxpayers

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03 Operating Context

ACHIEVEMENTS IN 2025

Financial Services

1. **Triple Crown Award** from Government Finance Officers Associations, recognizing best in class performance in financial reporting, budgeting, and the annual report.
2. Received **Unqualified Audit Opinions** for the 2024 consolidated financial statements of the Capital Regional District (CRD), Capital Region Housing Corporation (CRHC), and Capital Regional Hospital District (CRHD), affirming strong financial controls and compliance.
3. Successfully implemented the **PS 3400 Revenue accounting standard**, ensuring adherence to evolving public sector financial reporting requirements.
4. Completed the Phase 1 **implementation of the new financial model**, supporting better forecasting and planning.
5. Enabled **electronic access to T4 tax slips**, improving convenience for employees and administrative efficiency.
6. Initiated policy reviews as foundational work to support more integrated financial planning, clearer decision-making, and stronger risk management across programs and departments.
 - Developed a **new Credit Policy** to enhance financial risk management and balance operational needs.
 - **Procuring and implementing a new Purchasing Card Program and policy** to enhance transactional efficiency and oversight.
 - **Receivables monitoring**, establishing thresholds and reporting triggers to support proactive cash flow management.
7. Updated the **Business Continuity Plan**, strengthening the department's preparedness and resilience.
8. Introduced an **automated Project Intake Form** to streamline project evaluation and intake processes.
9. Launched a **Utility Billing dashboard** to improve customer service and streamline inquiry resolution.
10. Developed **revenue and expense dashboards** for enhanced financial transparency and internal reporting.
11. Refined **Operating Reserve Guidelines** to support consistent and sustainable reserve management practices.
12. Created a **Treasury Portfolio Monitoring Tool** to improve tracking and analysis of investments and liquidity.
13. Provided strategic financial guidance for major corporate initiatives, including the **Regional Water Supply Master Plan**, **Hartland Landfill** and **RNG plant** financial analysis.
14. Represented the CRD on the **Municipal Finance Authority's (MFA) Pooled Fund Advisory Committee**, contributing to inter-municipal investment oversight and best practices.

Technology & Digital Transformation

Digital Platforms & Online Services

1. Completion of upgrade to the CRD Corporate website platform.
Benefit: Improves accessibility, usability, and security for residents and stakeholders accessing CRD services online.
2. Completion of CRD Board Portal website.
Benefit: Enhances governance transparency and efficiency by providing secure, centralized access to Board materials.
3. Completion of Office Workplace space-booking tool pilot.
Benefit: Supports hybrid work models and optimizes use of CRD office space.
4. Completion of pilot of Microsoft CoPilot (early adopters).
Benefit: Tests the potential of AI tools to improve productivity, decision-making, and staff efficiency.
5. MyCRD – Online Payment Project in progress
Benefit: Provides secure and convenient payment options for residents.
6. PAWS – Payment & Web Services for Dog Licensing in progress
Benefit: Improves customer service delivery by enabling online self-service transactions.

Cybersecurity & Identity Management

7. Completion of the 2025 Cybersecurity Corporate Phishing Campaign.
Benefit: Strengthens staff awareness and resilience against phishing threats, reducing cybersecurity risk.
8. Completion of Digital Identity Management solution supporting MyCRD.
Benefit: Provides secure, seamless access for staff and residents across CRD applications and services.
9. Completed the upgrade legacy video surveillance systems at CRD facilities.
Benefit: Improves facility security, compliance, and safety for staff and the public.
10. Completed the PEN Test of CRD's ERP system.
Benefit: Validates system security and ensures compliance with risk management standards.
11. OT/SCADA Cybersecurity Mitigation Phase 1 underway to be completed by Dec 2025.
Benefit: Strengthens protection of critical infrastructure systems and reduces operational risk.

Modernization of CRD's IT Infrastructure & Workplace Technology

1. Completed upgrade of CRD Conference Meeting Rooms to Microsoft Teams.
Benefit: Enhances collaboration and accessibility with modern conferencing technology.
2. Completion of Network Management & Monitoring Solution.
Benefit: Improves network reliability, performance, and proactive issue resolution.
3. Completion of workstation upgrade of 200+ devices to laptops.
Benefit: Enhances staff mobility, supports hybrid work, and ensures modern, secure, and efficient computing resources.
4. Deployment underway of cell phone booster(s) underway to improve communication at CRD buildings and facilities.
Benefit: Ensures reliable communications in critical facilities and improves staff connectivity.

5. Deployment of Hearing Loop accessibility technology at 625 6th Floor Boardroom.
Benefit: Increases accessibility and inclusivity for residents and stakeholders with hearing impairments.

Enterprise Systems & Business Applications

6. Completed the upgrade of SAP Platform and deployment of new financial Model.
Benefit: Enhances financial transparency, reporting accuracy, and decision support across the CRD.

Regional Initiatives & Strategic Data Assets

7. Completed the 2025 Orthophoto project (regional initiative).
Benefit: Provides high-resolution aerial imagery to support planning, operational efficiency, and emergency response across the region.

Business Continuity & Strategic Planning

8. Completed annual Business Continuity Tabletop Exercises for CRD critical systems.
Benefit: Validates CRD's readiness to maintain essential services during disruptions.
9. Updates to Business Impact Assessment, Corporate Risk Registry, and Recovery Plans (in progress).
Benefit: Strengthens preparedness and ensures alignment with corporate risk management priorities.
10. Digital & Technology Strategy development underway to be announced fall 2025.
Benefit: Aligns divisional technology strategies with CRD's long-term service delivery priorities.

FACTORS THAT WILL AFFECT OUR OPERATIONS IN 2026 AND BEYOND.

Financial Services

- **Organizational growth:** has resulted in increased demand for financial services such as data analytics, service transformation, infrastructure planning, budgeting, reporting, payroll, and system development. In support of growth and to meet demand, modernization of digital platforms and business practices are key for scalability and efficacy of financial system structure and practices.
- **Staff Recruitment and Development:** Ongoing staff retirements and turnover—both within Financial Services and across the organization—have heightened the need for training and knowledge transfer. Addressing these gaps within a growing organizational structure puts additional pressure on existing capacity to meet annual deliverables and maintain service levels.
- **Corporate Finance and Decision Support:** There is sustained high demand for strategic financial support, including service establishment, infrastructure replacement planning, financing strategy development, and the creation of business cases and financial proformas to support informed decision-making.
- **Grant funding:** Given the limited funding, there has been a sustained increased in government grant activity, placing additional demand on Financial Services to support in eligibility assessment, application support, reporting and compliance. A continued trend of funders transferring administrative responsibilities to recipient organizations has further added to the workload.
- **Treasury and Debt:** Amid recent economic volatility and interest rate changes, the organization faces an increased need for proactive treasury planning and oversight of reserves in alignment with published operating and capital reserve guidelines. Ongoing economic and market developments are

creating added complexity in maintaining service sustainability and achieving adequate returns on invested reserve funds.

- **CRD Evolves:** Establishing a common vision for organizational growth to guide future service delivery, with a focus on consolidating similar work to reduce duplication, optimize resource use, and strengthen alignment across departments through 2026.

Technology & Digital Transformation (TDT)

- TDT is responsible for delivering and supporting the CRD's enterprise applications, cloud and data centre services, cybersecurity, enterprise architecture, identity management, web hosting, office productivity tools, service desk and IT support, business and project services, telecommunications and workstation services, as well as network, radio, and video services. In addition, TDT plays a central role in planning and guiding technology investments across the CRD.
- In response to rapid technological change, increasing digital demands, and direction from the Executive Leadership Team, TDT will lead the implementation of a comprehensive Digital and Technology Strategy. As the CRD's enterprise technology steward, TDT is pivotal in driving service delivery, safeguarding critical infrastructure, and enabling operational excellence across all departments.
- Digital and technology strategies and initiatives will include:
 - › **Technology Investments:** Continued focus on strengthening IT governance and enterprise prioritization through a centralized advisory framework that guides investment decisions, ensures alignment with corporate goals, and supports consistent delivery of strategic technology initiatives.
 - › **Development an Application Portfolio Management Plan** & a full application inventory with lifecycle, costs, and dependencies, and implementing a rationalization strategy to retire, replace, or modernize legacy applications while tracking progress on reducing technical debt.
 - › **Multi-year Modernization & Transformation Plan:** Continue to work with divisions and departments to replace aging applications, platforms, and infrastructure to close long-standing technical gaps, reduce risk, and establish a secure, scalable foundation for digital service delivery across the CRD.
 - › **Digital Services:** Focus on expanding self-service portals, client relationship management platform, online payment transactions, and centralized authentication, we are making it easier for residents and businesses to access CRD services anytime, from anywhere.
 - › **Expand Cybersecurity Capabilities** through our 3-year Cybersecurity program introducing vendor and third-party risk monitoring, creating a supply chain cybersecurity framework, implementing residual risk reporting to ELT and the Board, and aligning cyber insurance requirements with CRD's risk profile.
 - › **Data Strategy and Governance Planning:** Providing tools and technology to expand our data analytics and modelling capabilities to collect, share, and analyze data across departments by replacing outdated reporting tools and enabling cross-functional dashboards to support evidence-based decision-making.

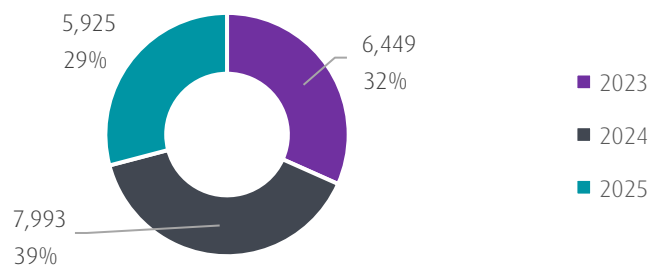
- › **Technology Advancements:** Advancing the plan for the safe adoption of artificial intelligence platforms and tools by focusing on responsible use, governance, and digital readiness. This includes early planning for Artificial Intelligence (AI) powered tools, establishing usage guidelines, and providing training to ensure employees can effectively and safely leverage AI in support of CRD services.
- › **Modern Workplace:** Providing the CRD workforce modern communication and collaboration tools, self service tools, upgrading workstations and tablets, and improving access to information to support hybrid work, collaboration, and employee engagement.
- › **Shared Platforms & Services:** Implementation of shared platforms that provide lasting value across the organization. Cloud migration of applications and systems, enterprise-wide platforms, advanced monitoring, and automation are being embedded into our long-term architecture to ensure the CRD can adopt new technologies securely, responsibly, and in alignment with corporate priorities.
- › **Advance IT Service Management:** Implementation of a modern service desk software application and supporting processes to provide self-service, online product service and catalogue and supporting capabilities to improve Service Level Objectives (SLA's)
- › **Workforce and Skills Readiness:** Ensuring succession and knowledge transfer plans are needed to address retirements, while structured change management must be built into all major IT projects to ensure adoption and value realization.
- › **Business Continuity Planning:** Business continuity and Disaster Recovery Plans are being embedded into our long-term support model ensuring the CRD can maintain critical operations during disruptions. This includes resilient infrastructure, redundant systems, secure cloud-based recovery solutions, and proactive testing. Regular updates to the Business Impact Assessment, Corporate Risk Registry, and recovery plans for critical systems and infrastructure will strengthen preparedness. In addition, completing Tabletop Exercises for critical systems and infrastructure will validate readiness, enabling the CRD to respond quickly and effectively to unexpected events while safeguarding essential services and supporting organizational resilience.
- › **Strengthen IT Governance and Investment Planning** by leveraging IT Advisory Committee (ITAC) for enterprise investment prioritization, creating a multi-year technology investment plan aligned to the Corporate Plan, and implementing benefits realization tracking across all IBCs and digital initiatives.
- For **customers and residents**, the CRD plans to focus on developing and deploying user-friendly digital identity and payment platforms, such as the MyCRD initiative, which will centralize and simplify access to various services, including online payments, permit applications, and real-time service tracking of requests. These initiatives are designed to make services more intuitive and accessible and reduce the need for in-person visits. Additionally, the modernization of the CRD website and the adoption of mobile-first approaches will ensure that digital interactions are seamless, user-friendly, and aligned with modern expectations for digital engagement. The enhanced digital infrastructure will lead to faster and more efficient service delivery, ensuring that citizens' requests and concerns are addressed promptly.

- For **employees**, the modernization and development of modern tools and technologies will bring significant improvements to daily work by streamlining manual tasks and modernizing the digital tools they rely on. Paper-based and repetitive processes will be replaced with automated workflows, reducing administrative overhead and freeing up time for higher-value work. Staff will have access to new project management and planning tools to better coordinate initiatives and track progress. Enhanced data sharing capabilities will make it easier to collaborate across departments, while improved access to low-code platforms and automation tools will empower teams to solve problems and optimize processes on their own. Real-time data and intuitive dashboards will support faster, more informed decision-making. Employees will also receive targeted training to help them adapt and succeed in this digital environment.

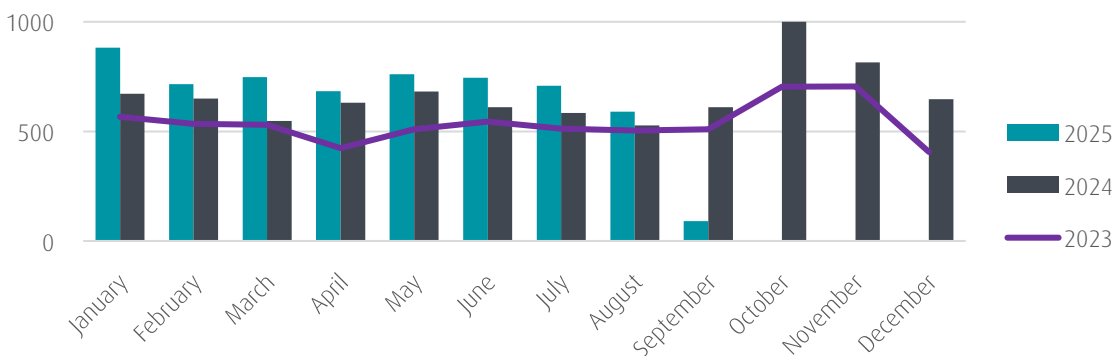
OPERATIONAL STATISTICS

The Technology & Digital Transformation operational data below illustrates the volume of requests completed by the service desks, as of June 2025.

Total Requests Received



Month Over Month Comparison



Request Types

	2024	2025
Audio Visual & Meeting Support requests	101	57
Desk Support Services (DSS) requests	1,803	1,122
Helpdesk requests	639	735
Radio & Surveillance requests	52	86
Telephony requests	267	357

04 Services

The services listed below rely on the support of several corporate and support divisions to operate effectively daily. More information about these services is available in the Corporate Services and Government Relations Community Need Summaries.

SERVICE BUDGET REFERENCES¹

- › 1.017 Financial Services
- › 1.022 Information Technology
- › 1.101 GIS
- › 1.105 Facility Management
- › 1.106 CRD Headquarters Buildings
- › 1.107 Corporate Satellite Building
- › 1.112 Regional Grant in Aid
- › 1.335 Geo-Spatial Referencing System
- › 21.1 Feasibility Reserve Fund

1. FINANCE SERVICES

Description

The CRD Financial Services team plays a vital role in supporting the organization's financial health and long-term sustainability. In addition to delivering strong financial leadership, strategic guidance, and reliable day-to-day services, the team enables operations and service delivery across the organization. This includes providing financial advice, modelling and scenario planning, and supporting departments with the insight and direction needed to make informed, fiscally responsible decisions. Together, these efforts ensure CRD programs and projects are delivered responsibly, transparently, and in alignment with organizational goals. Key responsibilities include:

- Financial Planning and Performance
- Corporate Accounting and Reporting
- Internal Controls over Financial Reporting
- Revenues and Collections (taxes and fees)
- Disbursements (vendor and employee reimbursements)
- Payroll
- Corporate Finance Policy and Decision Support

¹ Service budget(s) listed may fund other services

- Long Term Financial Planning
- Treasury and Banking
- Financial Systems
- Grants Management
- Utility Billing
- Procurement Services
- Other administrative services, such as transit pass inventory, internal printing, and interoffice mail distribution

What you can expect from us

You can expect services that ensure not only day-to-day financial operations run smoothly, but also strategic financial planning, compliance, and advisory support for the organization's growth and service delivery priorities.

► Strategic Financial Management

- Support over **190 CRD services** with financial planning and analysis
- Guide the development of the **Five-Year Financial Plan** and long-term financial strategies
- Evaluate large capital project proposals, including financial forecasting and risk assessments
- Provide financial decision support to service areas and leadership

► Budgeting & Reporting

- Oversee more than **35 operating budgets** and **100 capital projects**, totaling \$477M and \$414M, respectively
- Deliver **monthly financial reports** to over **160 budget owners**
- Produce annual **audited financial statements** and ensure compliance with legislation

► Revenue, Grants & Billing

- Manage **monthly and quarterly billing** for approximately **30,000 utility customers**
- Administer CRD's **external grants portfolio**, securing over **\$594M in funding** since 2014
- Manage internal grant programs, including **Community Works Fund, Grants-in-Aid**, awarding over **\$2.3M** to **65 applicants** in 2024 alone

► Payroll & Payments

- Process **biweekly payroll** for **1,600 employees**, totaling \$83M annually
- Complete over **30,000 vendor payments** and **23,000 invoice payments** each year, with over **99% processed on time**

► Treasury & Debt Management

- Manage **banking relationships** and process over **150,000 financial transactions** per year
- Oversee total long-term debt of **\$508.5M** across CRD, CRHD, and CRHC
- Ensure responsible reserve management in line with financial policy and market conditions

► Financial Systems & Administration

- Maintain and enhance financial systems through regular upgrades and innovation projects
- Deliver administrative services, including **transit pass inventory, internal print shop operations, and mail delivery** to **14 CRD offices**

► Procurement

- Enhance procurement practices within the Integrated Water Services (IWS) division to increase efficiency, transparency, and alignment with organizational goals

Staffing Complement

Financial Services: **60.0 FTE (including Managers, Administrative Support and Water Billing Services)**

2. TECHNOLOGY & DIGITAL TRANSFORMATION

Description

Technology & Digital Transformation is responsible for the development and delivery of highly available, reliable, and secure corporate information systems, technology services, and tools to CRD Departments, the public and the Board. Responsibilities include:

- Supporting and maintaining core foundation technologies and enterprise service delivery for network, telecom, cybersecurity, device, mobility, corporate and client applications, data centre and cloud services
- Providing Helpdesk Desk and Service Desk team support to all employees and interested parties.
- Management of our corporate SAP Enterprise Resource Planning (ERP) for Financial, Payroll, and Human Resources Systems (HRIS) SuccessFactors
- Providing corporate-wide voice, data, video conferencing, Wi-Fi and radio communications systems
- Management of Corporate Website and Digital tools and technologies
- Support for CRD Board and Committee meeting support
- Support for Office Productivity Suite (Microsoft 365) & supporting applications, tools and technologies
- Vendor and Contract Management Office for all IT contracts, services, software and licensing
- IT Project Portfolio Management and Technology Investment Planning through IT Advisory Committee
- Providing Geographic Information Data and Systems Support
- Delivery of Orthophotography and lidar data acquisition and deployment
- Management of Cloud Hosting and Data Center Services for all CRD applications.

What you can expect from us:

► Foundational Technology Services

We support and maintain the CRD's **core enterprise technologies and standards**, including network infrastructure, telecommunications, cybersecurity, mobility, client systems, data centers, cloud services, identity and digital identity and access management.

► End-User Support and Device Management

We enable a productive and secure digital workforce through Microsoft 365 collaboration tools, modern endpoint management, and responsive support services via the IT Service Desk and Desktop Support teams. Our team manages **over 1,000+ computers, monitors, and peripherals** to support employees across the regional district.

► **Enterprise Infrastructure Communication and Connectivity**

We manage and support the CRD's technology infrastructure, **interconnecting 300+ sites, 100+ enterprise and business applications, 600+ smartphones, 100+ virtual and physical servers and systems**, and over 1,100 full-time staff through an integrated end-to-end voice and enterprise data network.

► **Enterprise Resource Planning (ERP)**

We support and administer SAP, the CRD's **core ERP system**, delivering integrated financials, payroll, procurement, asset management, capital project accounting, and utility billing services for CRD, CRHD, and CRHC operations.

► **Digital Service Delivery Platforms**

We develop and operate CRD's **key digital platforms** including crd.ca public website, corporate GIS, SharePoint Online, and other business-critical applications. We oversee the CRD's Digital Strategy, lead the development and delivery of the Technology Strategy, and provide enterprise architecture, roadmaps, and governance across all technology and digital service initiatives.

► **Operational Support for Critical Services**

We support technology at Hartland Landfill, including **automated scale systems** processing 140,000 tonnes of waste annually and generating \$16M in revenue.

► **Land Management Systems**

We provide ongoing technical and operational support for the Tempest system used to manage **building inspections, bylaw enforcement, planning and zoning, and licensing services**, contributing approximately \$1.25M in annual revenue.

► **Project Delivery and Innovation**

We deliver technology planning, implementation, and oversight for over 25 active IT and business-led projects annually to meet evolving operational and strategic needs.

► **Records and Information Management**

In collaboration with Corporate Services, we advance **records management practices and compliance** through the implementation and adoption of SharePoint Online as the CRD's official Electronic Document and Records Management System (EDRMS).

Staffing Complement

Division: **57.77 FTE (including Managers and Administrative Support)**

05 Initiatives

Below are the initiatives listed in the [Capital Regional District 2023-2026 Corporate Plan](#) and the related initiative business cases (IBCs). For an overview of the financial impacts, including cost of staffing, please refer to the Provisional Budget report.

Initiative	Implementation year(s)
13a Goal: Effective systems, processes & policies	
13a-1 Advance strategic approaches to procurement and project delivery to build capacity, improve standardization and support affordable services	2024-2026
▶ IBC 13a-1.2 Manager of Procurement	2025-ongoing
▶ IBC 13a-1.3 Contracts and Procurement Modernization	2025-ongoing
▶ IBC 13a-1.4 Departmental Administrator (Paralegal and Assistant)	2027
13a-2 Advance the Technology Strategic Plan to guide the modernization and transformation of our current IT services and systems and launching new digital technology solutions	Ongoing
▶ IBC 13a-3.1 M365 SharePoint Online Transition to Information Management	2025-2029
▶ IBC 13a-3.2 SAP S4/HANA Service and Operational Enhancements	2025-2026
▶ IBC 13a-5.1 New Corporate Project & Service Management Platform	2025-ongoing
▶ IBC 13a-5.2 MyCRD and Supporting Platforms	2025-ongoing
▶ IBC 13a-6.2 Cybersecurity Risk Specialist	2025-ongoing
▶ IBC 13a-6.3 Senior IT Administrative Coordinator (Conversion)	2025-ongoing
▶ FUTURE IBC 13a-3.5 Mandatory Cybersecurity System PEN Testing Solution	Planned for 2027
▶ FUTURE IBC 13a-3.6 CRD Legacy Voice Replacement	Planned for 2027
▶ FUTURE IBC 13a-3.7 CRD Print Optimization & Managed Print Services Transition	Planned for 2028
▶ FUTURE IBC 13a-3.10 SAP S4 HANA Transition to SAP RISE (Cloud)	Planned for 2028
▶ FUTURE IBC 13a-4.1 Data Architect	Planned for 2027
▶ FUTURE IBC 13a-4.6 Ransomware Prevention Solution	Planned for 2027
▶ FUTURE IBC 13a-4.5 Alternate Data Centre	Planned for 2028
▶ FUTURE IBC 13a-6.4 SAP Developer (Conversion)	Planned for 2027
▶ FUTURE IBC 13a-6.5 SAP Analyst (Conversion)	Planned for 2027
▶ FUTURE IBC 13a-6.7 Technology & Digital Transformation Project Management Resource (Conversion)	Planned for 2027

▶ FUTURE IBC 13a-6.8 Technology & Digital Transformation Project Management Resource	Planned for 2027
13b Goal: Business capacity & continuity	
13b-1 Continue implementing business continuity planning and the Enterprise Risk Management framework	Ongoing
13b-2 Mature the integration of asset management into capital planning processes to strengthen fiscal management practices and support resource sustainability	Ongoing
▶ IBC 13b-2.1 Enterprise Asset Management System	2025-ongoing
13c Goal: Achieve sustainable budgets through innovation & streamlining while recognizing the need for infrastructure investments & accountability to taxpayers	
13c-1 Advance changes to policies and systems to streamline activities, reduce complexity and increase efficiency	2025
▶ IBC 13c-1.3 Senior Financial Advisor	2025-ongoing
13c-2 Optimize Financial Services through enhanced internal controls and continuous improvement methodologies	2024
SUPPORT SERVICES	
▶ IBC 13d-1.1 Resources required in Financial Services to help support all IBCs	2025-2026
▶ IBC 13d-1.2 Resources required in Information Technology & GIS to help support all IBCs	2025-2026

The following initiatives were included in a previous iteration of the Community Need Summary but have been **withdrawn**:

- ▶ 13c-1.1 Revenue Services
- ▶ 13a-3.3 CRD Communications Infrastructure Improvements
- ▶ 13a-4.2 IT General Compliance Support
- ▶ 13a-4.3 Cybersecurity Network Design Improvements Pilot