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Item No. 15.1.1
Halifax Regional Council
August 9, 2022

TO: Mayor Savage and Members of Regional Council

SUBMITTED BY:

Original Signed by 

Jacques Dubé, Chief Administrative Officer

DATE: August 5, 2022

SUBJECT: **Planning and Development Public Participation Policy**

ORIGIN

On February 23, 2016, the following motion of Halifax Regional Council (item 9.1.1, deferred from February 16, 2016 meeting) was put and passed:

That Halifax Regional Council:

- 1. Direct staff to develop a new Administrative Order, which would outline required and optional engagement activities for planning applications, policy amendments, and new policy development undertaken by the Planning & Development business unit and return to the Community Planning and Economic Development Standing Committee when this work is complete.*
- 2. Direct staff to investigate opportunities to implement new engagement tools as well as modernized existing tools on a go-forward basis in an effort to modernize the planning process;*
- 3. Initiate the process to consider amending the Regional Municipal Planning Strategy so as to require consistency in public consultation requirement/standards throughout all Municipal Planning Strategies and Secondary Municipal Planning Strategies; and*
- 4. Direct staff to return to the Community Planning and Economic Development Standing Committee on a yearly basis with the purpose of reporting on engagement activities performed in that year, and recommended improvements to the process.*

LEGISLATIVE AUTHORITY

Part VIII, Section **208** (c) of the *Halifax Regional Municipality Charter* requires the following:
"establish a consultative process to ensure the right of the public to have access to information and to participate in the formulation of planning strategies and by-laws, including the right to be notified and heard before decisions are made pursuant to this Part;"

Public participation program

219 (1) *The Council shall adopt, by policy, a public participation program concerning the preparation of planning documents.*

RECOMMENDATIONS ON PAGE 2

(2) *The Council may adopt different public participation programs for different types of planning documents.*

(3) *The content of a public participation program is at the discretion of the Council, but it must identify opportunities and establish ways and means of seeking the opinions of the public concerning the proposed planning documents.*

Engagement program

219A (1) *The Council shall adopt, by policy, an engagement program for engaging with abutting municipalities when the Council is adopting or amending a municipal planning strategy.*

(2) *Subject to the regulations, the content of an engagement program is at the discretion of the Council.*

(3) *The Minister may make regulations respecting the content of an engagement program.*

(4) *The exercise by the Minister of the authority contained in sub-section (3) is regulations within the meaning of the Regulations Act, 2018, c. 39, s. 14.*

An Act to Amend Chapter 39 of the Acts of 2008, the Halifax Regional Municipality Charter, Respecting Housing S.N.S., 2022, c. 13

14 (1) *Notwithstanding the Halifax Regional Municipality Charter, an applicable municipal planning strategy or any by-law, policy or practice of the Halifax Regional Municipality, where the Halifax Regional Municipality Council is considering any planning decision under Part VIII of the Act or a community council is considering any planning decision it is empowered to make under the policy establishing the community council, the Council or community council may not refer the matter to a planning advisory committee or any other advisory committee of the Council for a recommendation prior to the Council's or the community council's decision on the matter.*

RECOMMENDATION

It is recommended that Regional Council:

1. Direct the Chief Administrative Officer, when developing the new Administrative Order on Public Participation, to include:
 - minimum standards for engagement;
 - requirements for engagement with abutting municipalities; and,
 - direction to create a Planning and Development Engagement Guidebook and to use that Guidebook when considering additional standards for public participation; and
2. Direct the Chief Administrative Officer to return to Council with a draft public participation program for Council's consideration respecting potential amendments to the Municipality's existing planning documents to reflect the new Administrative Order.
3. Direct the Chief Administrative Officer to return to Council, after the public participation program is complete, with draft amendments to the Municipality's existing planning documents, for Council's consideration, to reflect and accompany the draft Administrative Order.

OVERVIEW

A public participation policy is legislatively required to guide how the opinions of the public are sought on proposed planning documents, as described under the *Halifax Regional Municipality Charter* (Charter). In 1997, Regional Council adopted a public participation policy, the *Resolution Regarding a Public Participation Program for Municipal Planning Strategy Amendments* (1997 Resolution). Planning and Development engagement policies and practices have also remained consistent with the overarching corporate 2008 Community Engagement Strategy.

As an engagement standard, the 2008 Community Engagement Strategy and 1997 Resolution do not include current best practices to advance diversity, equity, inclusion, and accessibility when seeking the public input. The 1997 Resolution also does not reflect the extent of current engagement for many planning projects, as Planning and Development (P&D) often engages more extensively than what is outlined in the policy. Through the creation of a new Administrative Order, HRM can establish a more up to date and consistent approach to designing engagement. This is anticipated the Administrative Order will direct the Executive Director of Planning to create a Planning and Development Public Engagement Guidebook (Guidebook), will include direction on when to use Guidebook , and set the minimum standards for public participation respecting proposed planning documents.

Since 2016¹, as directed by Regional Council, P&D has continually been updating and reviewing engagement practices, policies, and processes. Staff have investigated opportunities to improve and modernize the methods and practices used in communicating and engaging with the public, particularly underrepresented and underserved individuals, groups, communities and interested parties that are impacted by the decisions and recommendations of the business unit. Staff have also tested draft iterations of the Guidebook in different processes.

This report provides an overview of how engagement practices have evolved in recent years and some of the key initiatives undertaken to improve and analyze this work. A sample of the Guidebook is provided for Regional Council's information (Attachment A) and this report recommends how this might be used in a new Administrative Order. Should Regional Council approve the staff recommendation, the new Administrative Order would be brought forward within the next two months.

BACKGROUND

Process Improvements

In 2016, Regional Council directed staff to update HRM's engagement processes. Over the past number of years, various administrative improvements have been made. These include but are not limited to lessening the dependence on Public Information Meetings (or "stand and defend"-style meetings), encouraging open house-style meetings, using a range of mediums to allow residents to engage asynchronously, developing more user-friendly outreach, and redesigning notifications and signage. A Client Services Coordinator position was also created to support ongoing engagement practices across the business unit and generate consistent practices. This role has also enabled a strengthened relationship between HRM Corporate Communications and P&D by facilitating collaboration in designing engagement and communications plans.

Ongoing Engagement Reporting and Assessment

Since 2016, P&D has reported annually on engagement activities through the HRM Budget and Business Planning process. Additionally, when P&D staff have conducted public engagement programs, participants have been asked to provide feedback on the processes used. Shape Your City and other social media tools also allow staff to track participation. This feedback is summarized in Attachment D of this document and has been used to inform the sample Guidebook's engagement practices.

¹ [Planning and Development – Public Consultation Renewed - Feb 16/16 Regional Council | Halifax.ca](#)

Virtual Engagement

In September 2020, to respond to the COVID-19 pandemic, P&D updated their virtual engagement practices². This assisted staff in designing online engagement, included a scan of online engagement design resources and tools for addressing barriers to inclusion in online environments. This work has been incorporated into the sample Guidebook.

Diversity and Inclusion Practices

Since Regional Council's endorsement of HRM's Diversity and Inclusion Framework³, HRM has been focused on improving engagement practices to reflect diversity, equity, inclusion and accessibility. A Diversity and Inclusion Advisor position was created and based directly in P&D. This Advisor has focused on researching, evaluating, and experimenting with new approaches to engagement to better support the objectives of the Diversity and Inclusion Framework and best practices in engagement. This has included work redefining approaches to engagement, providing connections to the Diversity and Inclusion resources, and the development of special tools like the Anti-Black Racism Independent Resource Guide.

Best Practices Research on Diversity and Inclusion

In keeping with HRM's goals for diversity and inclusion, a review and assessment of the engagement tools was undertaken. For an outline of the research methodology see Attachments B and C. Emerging from the research the following overview is provided:

- Some jurisdictions demonstrated the importance of gathering demographic information to provide quick reference background/context data to identify and describe diversity in communities, particularly the lived experiences and socio-economic realities of underrepresented and underserved communities;
- Diversity, Equity, and Inclusion Lens tools prompted their users to ask critical reflective questions to identify and address systemic barriers, and promote equity, diversity and inclusion in policies, practices, projects, programs, and services;
- Where appropriate, the use of community-based participatory action approaches and tools helped communities to take on co-creative roles in planning and designing initiatives offering them ownership of projects and involvement in implementing actions;
- Some municipalities facilitated community leadership development by identifying, engaging, and empowering community leaders, in so doing building capacities, and generating respectful, sustained trust-based relationships;
- Trust and transparency were enhanced through ongoing dialogue with underrepresented and underserved communities; and
- Lastly, other jurisdictions made use of participatory monitoring and evaluation tools.

Evaluation of Existing Barriers to Diversity and Inclusion

Using the insights from research into promising approaches and tools, an assessment of completed planning applications and projects was undertaken as follows:

- Nine cases that were reasonably representative of P&D's standard processes were drawn from both urban and rural contexts;
- Constraints and opportunities for implementing equity, diversity, and inclusion practices were investigated with a focus on increasing equitable service to underrepresented and underserved communities in HRM;
- P&D staff were interviewed as part of the process to understand their chosen outreach methods, engagement styles and the motivations behind them. For the interview questions used and summary of this assessment see Attachment B; and

² [Proposed Amendments to Administrative Order 2020-009-ADM, Respecting COVID-19 – Planning and Development Public Engagement - Sep 1/20 Regional Council | Halifax.ca](#)

³ [Diversity & Inclusion Framework Final Version Aug 3 External.pdf \(halifax.ca\)](#)

- Advisors from the Office of Diversity & Inclusion and P&D staff and leadership worked together to draft and refine a series of iterative frameworks.

Internal Review and Testing

The sample Guidebook has been reviewed internally and tested in a sample of projects for refinement. Key learnings from the development of the sample Guidebook were used to inform approaches to engagement for the following projects:

- Culture and Heritage Priorities Plan (CHPP)
- Future of Gerald B. Gray Memorial Arena Site, 10 Monique Avenue, Dartmouth
- Case 22879 - Lovett Lake Estates development, Beechville
- Beechville Planning Strategy - MPS Review and Public Participation Program
- Beechville Community Benefit Action Plan
- Akoma Holdings Planning Application and Redevelopment Plan, Westphal
- Centre Plan Package B including Saint Patrick's Alexandra School site rezoning consultation (Future Redevelopment)
- Community Benefit Opportunities: Cogswell District Redevelopment Project and Windsor Street Exchange Reconfiguration
- Halifax Regional Municipal Planning Strategy (the Regional Plan) Review

Upon completion of the background research, reviewing existing barriers and opportunities, and testing the prototype, the sample Guidebook was developed (see Attachment A). Its purpose is to support staff to proactively address public engagement with influence, impact, inclusion and accessibility as primary and core considerations. It is anticipated it will be updated by staff periodically.

DISCUSSION

By standardizing public engagement practices through a new Public Participation Administrative Order, residents will be able to participate in public engagement and clearly understand the minimum standard by which the Municipality will engage the public. The Guidebook will establish the process staff will follow to establish recommendations to Council for additional requirements for public participation, or when recommending a separate public participation program that would be outside of the new Administrative Order.

The sample Guidebook is expected to be incorporated into the planning process as a digital design workbook comprised of easy-to-use templates (the Guidebook will be translated into a digital format upon Regional Council endorsement of a new Administrative Order). The document will be publicly available and clearly outline the process HRM uses to establish engagement programs. In creating the sample Guidebook, staff were guided by the following objectives:

- Improving public participation design so it is more transparent;
- Establishing the community's influence in municipal decision-making;
- Providing access to engagement opportunities through a variety of mediums;
- Responding to legislative/regulatory process requirements; and
- Strengthening inclusion, improving processes, and removing barriers to participation.

Planning and Development Public Engagement Guidebook

The sample Guidebook is intended to assist staff in developing a consistent approach to engagement for proposed Planning Documents, and amendments to them, as well as other policies, programs, and services by:

- Providing key steps and considerations for all types of engagements, prompting users to ensure they are as timely, effective, and barrier-free as possible;

- Identifying the resources available at HRM to support culturally-appropriate engagement by including reflective prompts throughout;
- Identifying tools for engagement as well as ways to measure the effectiveness of engagement, aligned with the level of engagement sought;
- Encouraging the 'right-sizing' of engagement according to the type of decision being made and the impact. It aims to strike a balance between of the type of project and the needs of the community it impacts, and outlines a set of guiding criteria for determining the appropriate levels of participation to invite from the public in the engagement process; and
- Demonstrating the range of participation tools and techniques available to staff whether they intend to disseminate information to the public, gather input through consultation, involve, or collaborate with the public, following the International Association of Public Participation standards (IAP2).

The implementation of the Guidebook will modernize engagement processes, providing a range of engagement opportunities to the public aligned to the type of decision being considered. The Guidebook will indicate when and how to apply an equity, diversity, and inclusion lens to broaden users' perspectives to ensure the insights from groups who face systemic barriers and inequities are sought and reflected in reports, recommendations, and outcomes. It is anticipated that the Guidebook that will be required under the new Administrative Order will be similar to the attached sample Guidebook.

Minimum Standards for Public Participation

To ensure transparency of the process and clear procedures for information sharing and consultation, a minimum degree of public engagement will be proposed for Proposed planning documents and amendments to them. These minimum standards for engagement will be established in an Administrative Order, along with direction to create the Guidebook, and to use the Guidebook when recommending additional public participation or when recommending a separate public participation program. The minimum standards reflect the public engagement standard of information sharing and consultation.

Engagement with Abutting Municipalities

Under the *HRM Charter*, an engagement program for abutting municipalities is required when Council is adopting or amending a municipal planning strategy. While regulations directing this have not yet been prepared by the Province of Nova Scotia, staff recommend that Regional Council establish such a program. Staff have been working to create an administrative procedure as part of the new Planning, Permitting, Licensing and Compliance system to create an efficient notification process. If provincial regulations are created, staff will review them to determine if amendments may be required to reflect the regulations, and if they are needed, prepare amendments for Council's considerations.

Existing Plans and By-laws

A review of HRM's existing planning documents indicates that there are inconsistencies in how public consultation is approached in different Plan Areas.⁴ In some instances, these inconsistencies are remnants of pre-amalgamation planning frameworks. For example, the former Town of Bedford Plan Area requires public information meetings for all "rezoning and development applications" regardless of scope or scale, which is a requirement that is unique to this Plan Area. As part of developing a new Administrative Order, existing planning documents (Municipal Planning Strategies and Land Use By-laws) will be reviewed to ensure that all consultation and engagement standards are consistent with the direction provided by Regional Council in the proposed Administrative Order.

Next Steps

Should Regional Council endorse this report's recommendation, staff will prepare a public participation program for amendments to the planning documents for Council's consideration. Staff will then prepare draft amendments to the planning document and an Administrative Order reflective of the direction contained in this report and return to Regional Council's for its consideration and approval of the package.

⁴ [Proposed Amendments to Administrative Order 2020-009-ADM, Respecting COVID-19 – Planning and Development Public Engagement - Sep 1/20 Regional Council | Halifax.ca](#) (See Attachment F)

This package will include repealing the 1997 Resolution.

FINANCIAL IMPLICATIONS

Should Council choose to implement the proposed new public participation policy there will be limited impacts to the P&D Budget for 2022-2023. Generally, it has been assessed that the proposed changes in process will result in an overall reduction of existing costs. For example, funds currently utilized for staffing, particularly regarding overtime associated with evening meetings, could be re-allocated towards improving technology, enhancing web-presence, the use of social media, and spending time in direct contact with citizens. Conversely, specific engagement programs that are wide-reaching and impactful in nature will have significant costs associated with them. These will be considered on an annual basis, through the Budget and Business Planning process for P&D.

RISK CONSIDERATION

By continuing to use older documents to guide engagement which are not reflective of current practices or best practices for diversity, inclusion and accessibility, Regional Council risks developing engagement programs that are not reflective of their current policy goals. Further risk is brought by not making the process and minimum standards available publicly.

COMMUNITY ENGAGEMENT

The sample Guidebook provides a range of flexible techniques to engage and encourage the community, particularly underrepresented and underserved communities, to participate in civic activities and be formally recognized in the decision-making processes of P&D. Engagement undertaken in preparing the document is outlined in Attachments B and D.

ENVIRONMENTAL IMPLICATIONS

Incorporating the use of virtual technology (website) and traditional methods (phone, mailout) for engagement allows Regional Council to continue to minimize barriers to engagement, but also reduces the need for residents to travel to meetings and limits the GHG emissions associated with this travel.

ALTERNATIVES

1. Regional Council choose to direct staff to retain the existing practice of community consultation utilizing the 1997 Public Participation Resolution of Council as well as the principles of the 2008 HRM Community Engagement Strategy to develop engagement. Staff does not recommend this alternative as discussed in the report.
2. Regional Council may choose to direct staff to develop a new Administrative Order on Public Participation that differs from the staff recommendation. This would require specific direction from Regional Council and may require a supplementary staff report.

ATTACHMENTS

Attachment A: Public Engagement Guidebook (Sample)

Attachment B: Research Methodologies & Summary

Attachment C: Promising Practices Reference List

Attachment D: Planning & Development – Engagement Statistics 2018-2022

A copy of this report can be obtained online at halifax.ca or by contacting the Office of the Municipal Clerk at 902.490.4210.

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PUBLIC ENGAGEMENT GUIDEBOOK (SAMPLE)

Public engagement is a vital component of every project undertaken by the Halifax Regional Municipality. Objective 9.1.1 of the Regional Municipal Planning Strategy (Plan) is to “*engage citizens in the development of policies, programs and services as the basis for building healthy, strong and inclusive communities*”. The Plan further states, “*HRM seeks to engage citizens in an ongoing dialogue through education, promotion and public debate on regional and local issues. Participation should be inclusive and accessible to all.*” This HRM Public Engagement Guidebook has been created as a tool to help ensure all HRM engagement initiatives are developed with these goals in mind.

Every project at HRM is different and has unique engagement needs. The HRM Public Engagement Guidebook is intended to assist staff in developing an approach to engagement for policies, programs and services that reflects the needs of the project and the community it impacts. It provides key steps and considerations for all types of engagements to ensure they are effective, accessible and inclusive. The Guidebook also identifies the resources available at HRM to support effective engagement planning, communications and decision making. It is divided into the following steps:

Step One: Assess the Need for and Purpose of Your Public Engagement Process

Step Two: Familiarize Yourself with the Community

Step Three: Develop an Engagement Plan

Step Four: Identify Barriers to Participation

Step Five: Design Engagement Activities

Step Six: Deliver Engagement

Step Seven: Review, Analyze and Report Feedback

Step Eight: Evaluate Engagement



STEP ONE: ASSESS THE NEED FOR AND PURPOSE OF YOUR PUBLIC ENGAGEMENT PROCESS

It is important to ensure engagement for your project provides the appropriate level of public engagement, based on legislative requirements, Council direction, the level of impact on the community and the level of influence participants have on the outcome. This allows you to set clear and realistic objectives for your engagement plan.

General Project Information

Project Title	
What is the decision being made in this project, program or initiative?	
Who will make the final decision?	

What Level of Engagement is Appropriate?

Are there legislated requirements that the public be engaged on the project? If yes, describe:		
Is there Council direction for public participation? If yes, describe:		
What is the level of impact your project will have? Use the table below to identify if it is low, medium or high.		
Level of Impact	Assessment Criteria	Examples
High	<ul style="list-style-type: none"> High impact across HRM, including significant changes to the built form, natural environment or the general health and safety of all HRM residents High degree of interest across HRM High impact on a neighborhood area Strong possibility of conflicting perspectives on the initiative or issues in question 	<ul style="list-style-type: none"> Council's Strategic Plan Municipal Planning Strategy/Land Use By-law Major zoning change proposals or change to land categorization Removal of a facility or service that serves the entirety of HRM Major service change Major transportation initiative
Medium	<ul style="list-style-type: none"> Sufficient degree of interest across HRM to warrant public engagement High impact on community group(s) or specific facility or service Moderate possibility for conflicting perspectives 	<ul style="list-style-type: none"> Development Agreement application Relocation of youth centre Proposed changes to a valued activity or program Proposed improvements to an HRM wide service, such as library services, snow removal or garbage collection Proposed improvements to customer services Provision of a community wide event
Low	<ul style="list-style-type: none"> Low impact on a neighborhood area, community group(s) or specific facility or service Small change or improvement 	<ul style="list-style-type: none"> Local street cleaning Removal of car parking lot Certain types of infrastructure improvements Road closures Fee increases Changes in service e.g. changes to a local youth activity program, such as timing or venue/ location Emergency information



What is the level of influence participants are likely to have on the project outcome?

Use the table below to identify if it is low, medium or high.

		DETERMINING FACTORS				
		Council Direction	Legislative Requirement	Technical Factors	Budget	Example
INFLUENCE	High	Council direction or desire to have community define policy or outcome	Strong legislative or Council policy requiring engagement	Not many technical constraints/ strong abilities to affect technical constraints	Budget or programs available to implement change	Secondary Plan Amendment
	Medium	Council policy or requirements cannot be changed, but there is some ability to affect the policy or outcome	Moderate legislative or Council policy requirements for engagement	Some technical constraints that limit outcome options	Some ability to adjust budgets or programs to implement change	Development Agreement Bike Lanes Recreation Centre
	Low	Council direction does not allow for ability to influence the policy or outcomes	No legislative or policy direction to require engagement	Limited ability to affect outcome due to technical standards or constraints	Minimal or no ability to adjust budgets or programming to influence change	Site Plan Approval Driveway Location

What is the appropriate level of public participation for your engagement?

The level of public participation also depends on the complexity of the project/initiative, timelines and resources, and may change throughout a project. Use your results from the previous tables in the matrix below

High	Inform	Involve/Collaborate	Collaborate/Empower
IMPACT Medium	Inform	Consult	Involve/ Collaborate
Low	Inform	Inform/ Consult	Inform/ Consult
	Low	Medium INFLUENCE	High

Inform: To provide the public with balanced and objective information to assist them in understanding the problem, alternatives and/or solutions.

Consult: To obtain public feedback on analysis, alternatives and/or decision.

Involve: To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.

Collaborate: To work with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.



Empower: To place final decision-making in the hands of the public.

Objectives of the Engagement

Describe the overall goal(s) of your project:

Based on the appropriate level of engagement identified for your project above, answer the following questions up to and including your identified level of public participation to determine the objectives of your engagement.

<p>Inform <i>This first step for all public engagement ensures participants have the information required to participate meaningfully.</i></p>	What is the information you want participants to understand?
	What do participants need to know to make this effort successful?
	What information is missing?
<p>Consult <i>Effective when the direction of an issue is constrained by time, budget, technical and/or statutory requirements. There may be an opportunity for residents to influence details.</i></p>	What specific types of information do you want from participants? (Input to inform decision-making recommendations or service delivery of a community, council or department, feedback on a proposal or general values related to an issue, etc.)
<p>Involve <i>Requires a more open timeframe.</i></p>	What decisions can participants influence?
	How will participants' input be incorporated into the decision-making process?
	How will you design your engagement to involve participants?
<p>Collaborate <i>Requires more time and/or resources/budget allocated.</i></p>	What specific contributions do you want from your participants?
	What authority are you willing to relinquish if necessary?
	What engagement elements are you willing to allow participants to lead or share responsibility for?
<p>Empower <i>This will usually be driven by council</i></p>	What specifically do you expect participants to do on their own?



STEP TWO: FAMILIARIZE YOURSELF WITH THE COMMUNITY

To ensure your engagement activities are effective, staff should become familiar with the community that will be impacted by the project. This research step will help you to give careful thought to the best methods to engage the diversity of individuals and groups in the community with whom you will need to consult.

Community Context

Review the following resources:

- Relevant Statistics Canada data
- Existing plans and reports for the community
- Active planning applications and projects in the surrounding area
- Stakeholders and community organizations
- Identified environmental constraints
- Identified heritage resources (registered heritage properties, heritage conservation districts, cultural landscapes)
- Infrastructure and traffic information
- Women’s Safety Assessments (WSA)

Consider the following questions:

Are there any demographics in the area that must be considered when determining appropriate engagement approaches?

(Languages spoken, cultural customs, socioeconomic characteristics, environmental challenges or priorities, historical context, access to technology, level of understanding of the issues being engaged on, responses to previous engagement, etc.)

What are the community resources and assets in the area?

(Local residents, local associations, clubs and networks, local institutions, physical assets, etc.)

How should you engage with the community to achieve the broadest and most representative participation?

(Open houses, public meetings, online engagement, mailouts, etc.)

What locations and times for meetings/activities would be most appropriate for and preferred by those you wish to engage? (See Step 5 “Event Scheduling”)

If you are unable to answer any of the questions above or would like additional information about the area you are engaging with, reach out to the [Office of Diversity and Inclusion/ African Nova Scotian Affairs Integration Office \(ANSAIO\)](#) and/or the area’s [Community Developer](#) for assistance.



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Community Needs

Consider whether the following screening conditions necessitate a more robust or targeted level of participation:

- The project may disproportionately impact historically underrepresented and/ or underserved communities.
- The project or issue could impact spaces, places or objects of cultural heritage significance.
- The project or issue is unique/challenging (i.e. it is difficult to understand, will likely have social impacts, may be heavily values-based or may be controversial, politically sensitive and/or have significant financial impacts).
- A significant number of people or groups have expressed strong interest and/or opposing opinions about the issue or project.
- The project or issue has the potential to impact sensitive government-community relationships as they relate to issues of trust.

If any of the above conditions apply or you are unsure, contact the Office of Diversity and Inclusion/ African Nova Scotian Affairs Integration Office (ANSAIO) to review the appropriateness of your anticipated level of engagement.

Engagement Strategies

The Office of Diversity and Inclusion/ African Nova Scotian Affairs Integration Office (ANSAIO) has developed strategies to centre the voices, interests, values and experiences of underrepresented identities and cultural groups in the engagement process. These include:

- African Nova Scotian Engagement Strategy
- Acadian and Francophone Engagement Strategy
- Indigenous Engagement Strategy
- Accessibility and Inclusion Strategy
- Newcomer and Immigrant Engagement Strategy

Actively and consistently include diverse community members when planning engagement activities. Many communities have been historically underrepresented in and excluded from participation.



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Pre-engagement

Pre-engagement may be necessary for applications or projects that require significant or sensitive engagement approaches. Pre-engagement is an opportunity for informal networking, individual introductions and enhanced communication by bringing together resources like the Office of Diversity and Inclusion/ African Nova Scotian Affairs Integration Office (ANSAIO), Community Developers, HRM staff from relevant departments or other stakeholders, to clarify any issues and determine the approach to the forthcoming engagement. Pre-engagement allows you to increase trust between communities and staff, leverage lived experiences, knowledge, networks and connections for guidance on mapping out community assets and resources and to develop a broad and inclusive outreach process. Key issues to consider during pre-engagement include:

- Identifying community demographics and stakeholders.
- Identifying any historically underrepresented communities who are impacted by the project and reviewing any dedicated engagement strategies that may exist.
- Getting a sense of the tone of the meeting, event or other form of communication. Is it friendly, welcoming and informative or full of jargon and difficult to understand?
- Identifying established organizations in the community who should be personally engaged to help encourage people to attend and/or “host” a meeting or event?
- Identifying any community sensitivities you should be aware of.
- Determining appropriate engagement approaches (how many engagement events are needed, optimal dates/time and platforms/venues to host the events etc.) and actions required.
- Identifying what physical barriers might prevent community members from participating in engagement opportunities and how best to address them. This will include thinking about the needs of people with disabilities, the needs of seniors and access to public transit.
- Clarifying the stakeholders’ roles and responsibilities in the engagement process.
- Ensuring that engagement approaches are as culturally appropriate, comprehensive and accessible as possible.



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STEP THREE: DEVELOP AN ENGAGEMENT PLAN

Plans for engagement should consider the messaging, goals, audience, methods, timing and resources required for robust public participation.

Developing Key Messages

Determine your communication goals and develop the key messages for what you want your audience to hear, understand and remember about the program, policy or project. Align your goals and messages with your engagement objectives and always keep in mind what you have learned about the communities being engaged.

Key messages should be able to answer the basic “who, what, when, where, why and how” questions that can be used to develop your communication materials. They should use accessible language. Effective key messages should be:

1. Clear – Free of jargon, devoid of technical language, and relevant
2. Concise – Deliver key messages in 7-8 seconds, it might be all the airtime you get
3. Consistent – Messages must be repeated if they are to sink in

Consider the following questions to help to develop key messages for your project (this messaging can be useful for mailouts, PIM, and other presentations and communications):

How did we get here?

Brief history/evolution of the project to date

What is the purpose of the engagement process?

Level of engagement and goal

What is the role of the public in the process?

What are the decisions being made/issues being addressed?

What is negotiable?

What the public can influence.

What is non-negotiable?

What the public cannot influence.

What are the project phases, decision making milestones and associated timeframes?

This will be developed further later in this step.

How can the public get involved or be heard?



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How will HRM communicate what happens next?

Notice of key milestones/follow up

Communications Plan

A Communications Plan may be required for projects that include large engagements, require more outreach, or are more sensitive in nature. HRM Corporate Communications have created a template [link to template] that is available to begin the process of creating a communications plan for your project.

For projects that may not require a full Communications Plan but that are anticipated to generate significant public and media interest, it is recommended that you contact Corporate Communications to update them on the project and any plans for engagement. This will allow them to be prepared should they receive requests for information.

Engagement Plan

Project Milestones Complete using Project Milestones table below.	Engagement Goal Identify the purpose of the engagement at this stage.	Target Audience Complete using Stakeholders identified in the Target Audience table below.	Engagement Tools Complete using Engagement Tools table below.	Date Meeting date, online platform launch date, etc.	Resources Required Staff, facilities, AV equipment, etc.

Project Milestones

Outline the key decision-making points, significant milestones and process towards decision making points and milestones, and your targeted timing for each.

Project Milestone	Target Timing

Target Audience



Complete the table below as necessary with any identified Stakeholders for your project. The Office of Diversity and Inclusion and/or Community Developers can assist with identifying relevant stakeholders in the area.

Stakeholder Type	Stakeholders	Representative & Contact Information	Engagement Objectives
General Community (Ex. residents, community members, civic leaders, elected officials, resident associations, elders, etc.)			
Special Interest Groups & Rightsholders (Ex. Indigenous peoples, community groups, environmental organizations, multicultural groups, youth groups, arts/cultural groups, social and health service providers, advocacy groups, sport/recreation groups, etc.)			
Businesses (Ex. developers, business owners, industry groups, chambers of commerce, business associations)			
Government Bodies & Institutions (Mi'kmaw Bands and First Nations people, Government of Canada, Province of Nova Scotia, HRM departments, YMCAs, public and private schools, colleges and universities, etc.)			
Other			



Engagement Tools

Identifying the appropriate tools to use for your engagement is important to ensure that your engagement goals are met. All engagement should proceed using appropriate and culturally acceptable methods for each of the different stakeholder groups.

Traditional engagement has generally focused on in-person meetings and activities, mailouts and print advertising. However, social media and formal online engagement platforms have become more common and user friendly. Online engagement allows public participation to take place on an ongoing basis with a broader geographic reach. However, before incorporating online engagement, there are several questions below to consider ensuring the approach is equitable and thoughtful.

Engagement plans should generally include multiple (low- and higher-tech) approaches and tools to ensure residents are able to participate, regardless of their ability or comfort attending meetings or accessing online engagement platforms.

Select engagement tools based on your project's identified level of public participation (Inform, Consult, Involve, Collaborate or Empower). The various levels of engagement should not be considered in isolation of the others. Tools from lighter levels of public participation should also be included to support the tools identified for more intense levels of public participation. Additional information regarding specific tools is provided in Step 5.

Inform

Online Tools:

- Application Website
- Shape Your City Page (Project Information, Documents, Videos, etc.)
- Email (leverage community e-bulletins/ neighbourhood email listservs)
- Social Media

Traditional Tools:

- Mailout
- Newspaper Ad
- Signage
- Displays
- Information hotlines
- Expert panels
- Site visits

Consult

Online Tools:

- Shape Your City Page (Polls, Surveys, Scales, Dropdown Choices, Q&As, Comment Forums)
- Social Media Discussion
- Email commenting

Traditional Tools:

- Workshops
- Interviews
- Phone/Mail Surveys
- Phone/Mail Commenting
- Open Houses
- Pop Up Engagement
- Engagement Storefronts
- Stakeholder Meetings
- Public Information Meeting
- Public Hearing

Involve

Online Tools:

Traditional Tools:



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<input type="checkbox"/> Shape Your City Page (Idea Pages, Interactive Mapping)	<input type="checkbox"/> Crowdsourcing/Ideation <input type="checkbox"/> Mapping <input type="checkbox"/> Design Charrettes <input type="checkbox"/> Participatory Budgeting
Collaborate	
<u>Online Tools:</u> <input type="checkbox"/> Document Co-creation <input type="checkbox"/> Online Communities	<u>Traditional Tools:</u> <input type="checkbox"/> Large Group Meetings <input type="checkbox"/> Working Groups <input type="checkbox"/> Advisory Committees
Empower	
<u>Online Tools:</u> <input type="checkbox"/> Online Voting	<u>Traditional Tools:</u> <input type="checkbox"/> Decision Making Platform <input type="checkbox"/> Public Participation Committees <input type="checkbox"/> Community Indicator Projects
<p>Consider the following questions as you choose your engagement tools:</p> <ul style="list-style-type: none"> • Many programs/ projects are built on personal relationships and the trust that comes with being face to face. Are staff in a position to recreate that same experience in an online setting? Is there enough of a trust reservoir to effectively bring these relationships and connections online? • Online only engagement can create a ‘digital divide,’ an uneven distribution in the access to, use of, or impact of information for many people who do not have access to e-devices and/or the internet. Be mindful of the Digital Divide 5 ‘A’s of Technology Access: <ol style="list-style-type: none"> 1. Availability – To whom is the technology available? 2. Affordability – To whom is the technology (un)affordable? 3. Awareness – Who is (un)aware of the technology? 4. Abilities – Who has the digital literacies to use the technology? 5. Agency – Who has the self-efficacy to make use of the technology? • What approaches and outreach will help to ensure all those who need to be engaged can fully participate? • How can we create opportunities for the people least likely to be heard to participate? For example, equity-deserving individuals and groups who are at greater risk of exclusion include but are not limited to: Indigenous communities; People of African descent; Persons with disabilities; women; racialized groups; 2SLGBTQ+ and gender diverse communities; temporary residents; immigrants and refugees; persons with low income; youth; seniors; victims of violence; persons who are homeless or under-housed; residents with increased vulnerability to environmental hazards, and development induced displacement. 	



STEP FOUR: IDENTIFY BARRIERS TO PARTICIPATION

Before finalizing your engagement, review your plan to ensure any barriers to participation are identified and addressed. Barriers to participation include those that are physical, structural, procedural, and emotional.

Barriers to Participation

Barriers to participation include anything that prevents a person from fully participating because of their age, language, ability, creed, etc., and may include a physical barrier, an informational or communications barriers, an attitudinal barrier, a technological barrier, cultural barriers, literacy barriers, and mistrust with the government, a policy or a practice. Individual residents, as well as whole communities, may have less experience, confidence, or capacity to participate. As such, it is critical to determine the most effective best practices for inclusive engagement. By anticipating and addressing barriers to participation we begin to ask critical questions and understand how and why persons are excluded and how we can work to foster inclusive and accessible engagement.

Consider the following questions to identify any barriers to participation you may have missed:

Are there any barriers or risks that may impede participation in your engagement process?

Is there a history between the organization and the community that you need to consider?

Social Lens Review

Consider the following questions to ensure your Engagement Plan will allow you to deliver a successful engagement process that achieves your goals and reaches all members of the community:

- Does your communication and outreach approach effectively reach all stakeholder groups and community members, including underrepresented groups?
- Engagement is easiest when it builds on networks that are already working. What other established organizations in the community can help encourage people to attend and/or “host” a meeting or event?
- Does your engagement approach allow you to provide information to stakeholder groups and community members in a way that is easy for them to understand?
- Have you considered tools that will help you to build a positive relationship with the community, including underrepresented groups?
- Have you considered tools that will help stakeholder groups and community members understand any trade-offs that may be required to achieve project goals?
- Will conversations continue after the project concludes?
- Are the resources available (budget, staff time, etc.) to effectively deliver the engagement?



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STEP FIVE: DESIGN ENGAGEMENT ACTIVITIES

It is important to carefully design your engagement's correspondence, website, online engagement tools and events. Messaging should be clear and welcoming to ensure it is accessible and will help to build trust and relationships.

Online Engagement

Project Website

HRM's website, www.halifax.ca, provides information on municipal operations for residents. It includes pages regarding major projects, programs, initiatives and applications across all HRM departments.

The website is primarily effective when used at the Inform level public participation. Project websites can be used to communicate the Key Messages identified in Step 3. Websites can provide a summary of the project and its goals, an outline of past and upcoming work, links to resources and information on how to participate or obtain additional information.

Website content should be written in plain language and updated regularly to reflect developments in the project. Requests to update a project website should be sent to PlanningDevClientServices@halifax.ca.

Social Media

HRM and HRM Planning currently operate accounts on Twitter (@hfxgov and @hfxplanning), Facebook (Halifax Regional Municipality and Halifax Planning), Instagram (@hfxmoments), Youtube (HRMNovaScotia) and LinkedIn (Halifax Regional Municipality).

Social media is primarily effective when used at the Inform level of public participation. These channels can be an effective way to share messages, links to reference documents and advertisements for upcoming engagement activities. Content can include short messages, images and videos (including some live broadcasting).

In order to post on HRM social media, you should draft your content and contact Planning & Development's Client Services Coordinator to refine and post.

Shape Your City

Shape Your City Halifax is HRM's online engagement website. Shape Your City is a Bang the Table platform that provides a variety of tools to help you achieve your engagement goals. Privacy and moderation settings can be adjusted, based on project requirements. Tools include:

Quick Polls

Staff can ask a question and allow users to select a single answer to that question. Once answered, the results display in place of the poll.



Surveys

Staff can ask a series of questions with different formats. Questions can be formatted to be open responses, scales (including rankings, priority gauges and emojis), and choices (dropdown lists, multiple choice and checkboxes).

Q&As

Users can submit questions about the project for staff to review. Staff can then answer publicly, answer privately or delete the question.

Stories

Staff can create a topic and users submit long-form text responses. Users can then comment on responses that have been posted.

Forums

Staff can pose a question or a series of questions to which users can reply in the form of public comments. Comments can be responded to by other users and responses are posted to create a discussion thread.

Ideas

Staff can pose a question for brainstorming or ideation and users can post their solutions as “post-its”. Post-its can be liked or commented on by other users.

Places

Staff can post a map of the project area and users can drop pins within the map and post comments.

Shape Your City can be effective for all levels of Public Participation. However, it can generally only efficiently support self-directed, asynchronous engagement. This means that communication between project staff and participants cannot take place in real time. However, staff must be sure to respond to feedback and questions through Shape Your City in a timely manner in order to continue to build trust with the community.

Online Engagement Best Practices:

- Conduct pre-engagement, particularly when working with underrepresented groups or communities, to identify the engagement that works best for their needs.
- Include a combination of self-directed and one-to-one engagement to address a wide variety of barriers to participation.
- Provide multiple opportunities to participate and use both online and traditional methods. Larger projects can benefit from a wide range of tools, while smaller projects may only need one or two. In most instances it will be important to include more traditional methods such as phone and mail to support online tools and ensure access for individuals without computer access.



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- When managing large groups more staff resources may be required in supporting the online conversation and dialogue.
- To create community connections with stakeholders or underrepresented groups, small group formats may help with information sharing and building of trust.
- When creating a schedule for online engagement, consider that time is needed for active participation, as well as compiling information, resharing, and allowing time again for participants to validate this material.
- Moderation support is offered on Shape Your City for some tools to hide comments that are not appropriate.
- Online engagement tools often have embedded tools for accessibility, such as voice to text translation and image descriptions.
- Resources for planning accessible online meetings
 - [HRM Best Practices for Accessible Online Engagement](#)
 - [Nova Scotia Accessibility Directorate Department of Justice Guide to Planning Accessible Online Meetings and Events](#)

In-Person Engagement

In-person engagement events can take many forms, including:

- Public Information Meetings
- Public Hearings
- Open Houses
- Workshops
- Pop-Up Engagements
- Engagement Storefronts
- Crowdsourcing
- Design Charettes
- Working Groups

The goal of any in-person engagement is to optimize mutual learning. These events can be effective for all levels of public participation and allows for synchronous engagement. This means communication between project staff and participants can happen in real time.

- Resource for planning accessible in-person engagement
 - [Accessible Events Checklist](#) (in 'Appendix 2 of the [Special Event Planning Guide \[PDF\]](#))

Event Scheduling

When scheduling an engagement event, selecting appropriate locations and timing is vital to its success. Consider:

- **What is the best location for the event?**
 - Is it well known in the community?



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- Is it accessible by walking/public transit?
- Is it physically accessible?
- Is it in an area generally regarded as “safe”?
- For passive consultation events, are members of your target audience likely to be there?

- **What is the best date for the event?**

- Are there any community events/holidays that might conflict with your engagement and prevent residents from attending?
- Is your target audience available on weekdays or weekends?

- **What is the best time of day for the event?**

- Will people with jobs outside of the area be able to attend daytime sessions?
- Will caregivers/parents be able to attend sessions in the evening?
- Will the timing of the event be convenient for people who rely on transit?

Event Set Up

The way you are planning to interact with event attendees will largely inform how you set up your event space. It is recommended project staff arrive well in advance of any event to set up and address any technical issues before members of the public begin to arrive. Consider:

- Audience members should have a clear view of any presentation screens and microphones for providing comments should be placed to the side of any space so participants lining up do not disrupt audience views.
- If attendees are intended to cycle through the space, station staff to greet attendees and explain the process, as well as at key locations in the room to answer any questions. Ensure seating for members of the public is still provided outside of the intended flow of traffic.
- If the meeting room is physically large, make sure an audio system is installed and all participants use the microphones provided.
- Plan the meeting space to ensure there is room for participants who use mobility aids to move around freely.
- Keep in mind the needs of various participants and their service providers, such as seat allocation nearest to the sign language interpreters for people who are hearing impaired.

Presentations

Presentations are a common and effective way to provide information to attendees and establish a base level of understanding of the project, prior to beginning to have conversations. When planning a presentation:

- Use plain language and ensure slides and other materials are clear, to the point and concise.
- Speak clearly and at a moderate pace to make the information easier to understand.



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- Begin the presentation with introductions of key staff, the goals and agenda for the session, background information on the project, and the project’s parameters and limitations.
- Inform participants of the nearest emergency exits and accessible restroom facilities.
- Outline how resident input will be captured and managed and what will be the means of reporting back to the community e.g. “What We Heard” reports.
- Advise participants to minimize interruptions and outline when question and answer periods are scheduled. During question and answer periods, remind people to speak slowly and clearly and state their name before beginning. Thank participants after they finish their remarks and consider summarizing what has been heard from each speaker (verbally, on chart paper, on screen, etc.). Staff can also ask clarifying or follow-up questions to ensure what was heard is accurate.
- Manage the speaking time of participants to ensure fair, respectful and time-conscious opportunities for all who wish to participate.

Barriers to Participation

Events must be physically accessible to ensure all residents are able to participate in engagement. Consider:

- Venues should be fully accessible (including building entrances, meeting rooms, washrooms, etc.).
- Any materials provided should be high contrast.
- Events should be scent free.

In addition, when necessary, there are many services that can be provided to help remove barriers that may prevent residents from attending, including:

- Child care at the event.
- Transportation to the event.
- Food and beverages.
- Translation/captioning services.
- Attendant care workers.

In-Person Engagement Best Practices:

- For longer meetings, include regular health breaks in the agenda and identify when they will be taking place at the beginning of the meeting.
- Provide a feedback mechanism, such as an e-mail address or phone number, to all participants at the start of the meeting or in the meeting materials.
- Ensure that HRM staff are easy to identify at events and are visually distinguishable from applicants, consultants, etc. (name tags, HRM lanyards, etc.).
- Consider the use of a facilitator, who is external to the organization but connected to the community, to help design a group process and manage the meeting. This is



especially important if an interactive component is designed to encourage dialogue among attendees, or between staff and the public. Recognize the importance of their contribution as experts and compensate them accordingly.

- Consider community-led collaboration opportunities whereby community representatives are provided the opportunity to both collaborate in the planning process and share in the presenting of components of the strategy, such as information and question/answer sessions, etc. This is especially important for in-person engagement and/or forums where expected levels of impact, participant influence, and participation fall into the medium/high categories under Step One.

Committee Engagement

Committee Type	Benefits	Drawbacks
<p>Planning Advisory Committee (PACs) Comprised of residents selected by Council to represent their communities who are afforded the opportunity to comment on and provide recommendations directly to Council regarding planning applications and matters. Members are appointed for a select term and meet monthly.</p>	<ul style="list-style-type: none"> • Community feedback is provided by individuals who have been versed in HRM’s processes and policies. • Members of the public provide comments that are directly referenced in reports and Council discussion. • Councillors who sit on PACs have the opportunity to see projects early in the process and how it does or does not evolve based on community input. 	<ul style="list-style-type: none"> • The addition of another formal meeting further lengthens the planning application process. • Experience in the fields of planning, development or architecture are not required for committee members. As a result, the input provided is as residents, not experts.
<p>Public Participation Committees Comprised of residents and stakeholders formed to provide input on and guide the development of a specific planning project, policy or application.</p>	<ul style="list-style-type: none"> • Committees can often create a sense of ownership of the project by the community, increasing buy-in. 	<ul style="list-style-type: none"> • Work done by these committees may duplicate input provided by the public through other engagement tools. • A lack of background in planning and development can result in a steep learning curve for members.



<p>Design Review Committee Comprised of a group of professionals with experience in the development industry who review applications and policies related to Site Plan Approval.</p>	<ul style="list-style-type: none"> • Staff and Council can draw from the experience of other experts in the development field to add value to planning projects. 	<ul style="list-style-type: none"> • Committee members who work in the private sector may be hesitant to critique the work of other professionals.
<p>Advisory Committees Comprised of residents selected by Council who represent various interests to review and provide advice to staff and Council.</p>	<ul style="list-style-type: none"> • Staff and Council can draw from the experience of members of the committees who have specific interests impacts by the project, policy or application. 	<ul style="list-style-type: none"> • A lack of background in planning and development can result in a steep learning curve for members. • The addition of another formal meeting further lengthens the planning application process.



STEP SIX: DELIVER ENGAGEMENT

While carrying out your project's engagement plan, you should continue to be mindful of its effectiveness and make changes if required. It is also important to communicate with stakeholders on an ongoing basis to develop a successful relationship with the community.

Monitoring Engagement

While completing your engagement consider the following:

- The goal of all engagement activities is to provide participants with a welcoming, accessible and inclusive experience that is effective in its delivery.
- To build trust, center marginalized voices:
 - Recognize the privileges of people in the organizing group
 - Understand the level of trust with the organizing group
 - Begin with listening to issues of importance to communities you hope to work with
 - Are there existing initiatives led by those communities that you can support, if they want your support?
 - Clearly define and communicate and revisit often the roles and engagement approach
 - Consult with impacted people regarding photos, images, or language used in communications
 - Support volunteer leadership with honorariums
 - Understand and plan for target participants' access to hardware and Internet
 - Understand participants level of comfort engaging online (with prevalence of anonymous/bigoted comments)
 - Take the time to invest in relationship-building. Move at the speed of trust.
 - Consider impact of data privacy
 - Find solutions to increase computer/internet access
- Engagement activities should be monitored to ensure they are reflective of the key questions and considerations identified in Steps 1-5.
- If the scope of the project or level of community impact changes, the engagement plan may need to be reviewed.
- Ensure the environment is welcoming to participants who may be reluctant to share their views.
- Resources for facilitating meetings include:
 - [Engaging Questions for Public Engagement](#)
 - [Accessibility Guidelines for Organizers and Facilitators](#)
 - [Facilitating Public Issues Best Practices](#)
 - [Facilitation for Healthy Communities Toolkit](#)
 - [Diversity Through Inclusive Practices Toolkit](#)
 - [100 Great Community Engagement Ideas](#)



Project Updates

In order to maintain a relationship with the community, you should keep the community up to date on the process and progress of the project's development throughout. Provide information about opportunities for further consultation and participation using a public engagement feedback loop. It is important that these updates take place in a timely manner. Outline a timeline of next steps that reflect the results from the engagement activities. Participants should also be made aware how their feedback may influence and direct the future of the project. A public engagement feedback loop should include information on the following:



Depending on the nature of your project, updates can be communicated via:

- Project Website Updates (important dates, amendments to proposals, project materials, engagement materials, decisions at milestones)
- Mail/Email Lists (important dates, amendments to proposals, project materials, engagement materials, decisions at milestones)
- Public Meetings (amendments to proposals)
- Stakeholder Meetings (amendments to proposals, new information/issues, decisions at milestones)



STEP SEVEN: REVIEW, ANALYZE AND REPORT FEEDBACK

In order to ensure all the feedback from your engagement is considered, it is important to keep organized records of the comments received and how they have been addressed. This helps to ensure your process is transparent and supports stronger relationships with the community.

Comment Management

Logging the public’s comments, concerns, and requests and your responses to them will allow you to be sure you have considered all the feedback you received in the recommendations for your policy, project or program. It also allows you to provide increased transparency related to your decision making by allowing you to demonstrate how each comment was considered and addressed.

The table below includes some information for you to consider gathering throughout the course of your engagement. The types of information gathered can be altered or expanded, depending on the project.

Date	Source	Commenter Name/ Contact Information	Organization Represented	Summary of Comment	Comment Category	Result
<p>Date that the comment was received.</p> <p>This allows you to monitor at what point in the project you received the comments and your response time.</p>	<p>Engagement event, Shape Your City, email, phone, etc.</p> <p>This allows you to identify which activities successfully generated public participation.</p>	<p>Name and contact information of the commenter (if available).</p> <p>This allows for follow up if required and should follow Access and Privacy requirements.</p>	<p>Name of the organization or group the commenter is representing (if applicable).</p> <p>This allows you to group comments from the same source together for consideration.</p>	<p>Summary of the main points raised and link to full correspondence (if available).</p> <p>This allows you to consider each of the main comments, concerns and requests being brought forward.</p>	<p>Any common categories that comments fall into.</p> <p>This allows you to better organize comments as you evaluate them.</p>	<p>The impact the comment had on the project, policy or program OR reasons that the comment was not able to be acted on.</p> <p>This allows you to track your decision making so that it can be defended as the project moves forward.</p>



What We Heard Reports

The creation of a ‘What We Heard’ report is an effective way to summarize the feedback received through engagement. Furthermore, when these documents are published, the public has an opportunity to review and validate the report’s findings or bring forward concerns that may not have been addressed.

While the format of a What We Heard Report can vary from project to project, they generally include the following sections:

What We Did	This section provides an overview of the project and a summary of the engagement activities that have taken place. This summary should include details like dates, engagement tools, venues, number of participants, etc.
Who Was Involved	This section provides a summary of the participants and stakeholders that took part in engagement activities and the correspondence received. This section can also serve as an important opportunity to identify any groups that may have been missed by the engagement.
Results/Discussion	This section identifies the topics identified by participants during engagement activities and how they have been or will be addressed. This section may be organized based on the key themes from across the engagement, feedback received during each engagement activity, etc.
Implications	This section summarizes the feedback and outlines next steps for the project.

Social Lens Review

Consider the following questions to ensure your findings are reflective of and sensitive to all members of the community:

- How will the proposed policy, project or program decision affect underrepresented groups?
- Are the insights from groups who face systemic barriers and inequities reflected in the report, recommendations and outcomes?
- Does the policy, project or program decision worsen or ignore existing disparities?
- Based on the above responses, are revisions needed?
- Did you receive any comments or concerns that should be forwarded to other departments for response, consideration/action?



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STEP EIGHT: EVALUATE ENGAGEMENT

By evaluating the success of your engagement activities, you will be able to identify any issues that may need to be addressed in your project and inform future HRM engagements.

Engagement Surveys

Business Services has created a short survey Staff are encouraged to provide at all public engagement sessions. This survey asks for feedback regarding the convenience of the event timing, clarity of the information provided, availability of opportunities to ask questions and suitability of the format. The survey also requests high level demographic information about the attendee.

If you are planning to have participants complete project specific surveys, or do not feel handing out the engagement surveys will be viable or appropriate at your event, Business Services have also created a more general form which planners are asked to complete following the engagement session to allow them to collect engagement statistics for HRM.

The engagement survey is available [HERE](#) [link to survey] and the engagement form is available [HERE](#) [link to form]. Planning & Development’s Client Services Coordinator also has hardcopies of these documents available for pick up. These forms and surveys are to be returned to Business Services. They will be used to monitor the number of events hosted by HRM and the number of people who attended. The feedback is also used to inform plans for future engagements.

Evaluation Table

Consider the indicators below to assist in the evaluation of your engagement program:		
Principle	Qualitative Indicators	Quantitative Indicators
Inclusive Participation	<ul style="list-style-type: none"> <input type="checkbox"/> All groups affected by the project have been involved in the engagement <input type="checkbox"/> There were no barriers to participating in the engagement process <input type="checkbox"/> Impact of participant input has been communicated to the public 	<ul style="list-style-type: none"> <input type="checkbox"/> Number of people participating in each engagement activity <input type="checkbox"/> Number of stakeholder groups participating in engagement <input type="checkbox"/> Number of website visits <input type="checkbox"/> Number of emails/phone calls received <input type="checkbox"/> Observational feedback from project staff, attendees and stakeholders <input type="checkbox"/> Business Services Survey demographic info <input type="checkbox"/> What We Heard Report



Balanced and Complete Information	<ul style="list-style-type: none"> <input type="checkbox"/> The form of engagement and the information provided was reflective of the appropriate level of participation identified in Step 2 <input type="checkbox"/> Information provided was balanced and relevant <input type="checkbox"/> Project information and criteria used by decision makers is available to the public <input type="checkbox"/> Information about how public input was used is available to the public 	<ul style="list-style-type: none"> <input type="checkbox"/> Surveys regarding public understanding of the project <input type="checkbox"/> Observational feedback from project staff and attendees <input type="checkbox"/> Count of references to HRM sources in public correspondence <input type="checkbox"/> Accurate media coverage of the engagement process <input type="checkbox"/> What We Heard Report <input type="checkbox"/> Social Media reporting (where applicable)
Effective Process	<ul style="list-style-type: none"> <input type="checkbox"/> Engagement plan used methods that met the established engagement goals <input type="checkbox"/> Engagement plan offered multiple opportunities and venues in which to be heard 	<ul style="list-style-type: none"> <input type="checkbox"/> Surveys/participant feedback regarding public access to the engagement <input type="checkbox"/> Number of people participating in each engagement activity <input type="checkbox"/> Number of stakeholder groups participating in engagement <input type="checkbox"/> Number of website visits/time spent on site <input type="checkbox"/> Number of emails/phone calls received <input type="checkbox"/> Observational feedback from project staff <input type="checkbox"/> What We Heard Report
Capacity Building	<ul style="list-style-type: none"> <input type="checkbox"/> Increase in experience and knowledge regarding the engagement process by residents <input type="checkbox"/> Development in the relationship between the community and HRM <input type="checkbox"/> Identification of lessons learned 	<ul style="list-style-type: none"> <input type="checkbox"/> Surveys/participant feedback regarding public experience with the engagement process <input type="checkbox"/> Number of new contacts identified for future engagements <input type="checkbox"/> Number of follow up meetings/conversations planned
Resources	<ul style="list-style-type: none"> <input type="checkbox"/> Engagement activities has appropriate staffing levels, venue locations, AV support, online tools, budget, etc. 	<ul style="list-style-type: none"> <input type="checkbox"/> Surveys regarding public access to and experience with the engagement process <input type="checkbox"/> Resources used



You can also conduct a debrief with your project team to reflect on the project and lessons learned. Questions to discuss include:

Did we get the participation we had hoped for?

Did the engagement reach interested people and ask the right questions?

Did participants understand the process and their role in it?

Did participants understand the impact their participation had on recommendations and/or decisions?

Was the process timely and effective?

Did the chosen engagement levels and techniques accommodate the needs of participants?

Was the process accessible, inclusive, and flexible?

Did we get the information we were seeking for the decision makers to make an informed decision?



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Attachment B: Research Methodologies & Summary

Internal Research

A comprehensive internal evaluation of the consultation tools available to planning staff and Council was undertaken to identify opportunities to build on municipal and community strengths while addressing key areas in need of improvement to ensure the planning process is accessible and inclusive of all residents, and that HRM is getting the best possible community input with the resources available. The work was informed by the following guiding documents:

- HRM Charter
- 1997 Public Participation Resolution
- HRM Community Engagement Strategy - Improving HRM's public involvement practices Council Report November 25, 2008
- HRM Community Engagement Strategy and Toolkit 2008
- Regional Plan+5 Interim Report on Community Engagement March 6, 2013
- P&D Strategic Plan Action 12: Modernize Public Engagement
- Planning and Development - Public Consultation Administrative Order
- Planning and Development - Public Consultation Renewed Council Report February 16, 2016
- Diversity & Inclusion Framework Halifax Regional Municipality
- Atlantic Planners Institute Professional Code of Conduct
- Canadian Institute of Planners Code of Professional Conduct

External Research

Research began with a high-level jurisdictional scan of other municipalities and institutions to understand how equity, diversity and inclusion considerations have been framed in community engagement (CE) strategies and implemented in practice. Focus was given to CE strategies with techniques, tools, toolkits, guidelines, guidebooks, and workbooks and techniques explicitly seeking to identify and remove barriers to inclusive, representative, and balanced participation and engagement. A result was a "Best Practices Research Catalogue" of tabled data comparing and evaluating tools and techniques across multiple jurisdictions responding to similar diversity and inclusion issues. The catalogue identifies and anticipates implementation challenges and considerations associated with the tools and techniques to assess their potential suitability for application in the context of HRM.

Assessment of Completed Planning Applications and Projects – Interview Questions

1. Does the scope of P&D's community engagement processes appropriately respond to and align with the size and complexity of the issues in the communities being engaged and impacted by the project, program, or policy?
2. What are the barriers to diverse and inclusive practice from the planners' perspective?
3. What approaches to outreach will help to ensure that everyone is able to fully participate?
4. How can we create opportunities for people least likely to be heard to share their specific concerns?
5. How can we generate a better understanding of the planning process (capacity building)?

Assessment of Completed Planning Applications and Projects – Summary

The interviews revealed the various challenges experienced by staff and the public. Existing policy provides little guidance on baseline engagement standards (required and optional engagement activities) and appropriate levels of participation to invite. This could create a weakness where inconsistent engagement approaches could be used. Or where people are being asked to participate in public participation with little ability to influence outcome because of the nature of the decision at hand, there could be engagement fatigue. Members of the public have expressed concerns about the timing and location of engagement sessions as barriers to participation, which staff are continuing to address by creating multiple methods and means for engagement. Concerns were also expressed about the complexity of the language used in HRM communications materials due to its highly technical nature. Staff frequently observed a lack of diversity as seen by the narrow representation of voices and perspectives at public participation sessions. Lastly, in instances where staff would have liked to undertake more comprehensive engagement or more analysis to encourage plain language, this can be hindered by resource constraints (time, human, financial, technological).

Attachment C: Promising Practices Reference List

1. [A Guide to Community Engagement with People with Disabilities](#)
2. [A Six Step Public Engagement Guide For Capital Projects \(Arlington\)](#)
3. [CAWI Advancing Equity And Inclusion: A Guide For Municipalities](#)
4. [CAWI Making Ottawa's Municipal Governance Equitable And Inclusive](#)
5. [CFNU Equity And Inclusion Toolkit](#)
6. [Collective Impact Forum Engagement Toolkit](#)
7. [Community Engagement for Collective Action](#)
8. [Community Engagement Planning Toolkit \(Peterborough\)](#)
9. [Community Engagement Policies in Comparator Municipalities Report \(Guelph\)](#)
10. [Community Engagement Techniques \(University Of Utah\)](#)
11. [Community Engagement Toolkit For Planning \(State Of Queensland\)](#)
12. [Community Planning Toolkit - Community Engagement](#)
13. [Community Toolbox \(University Of Kansas\)](#)
14. [CRIAW Diversity Through Inclusive Practice Toolkit](#)
15. [Design An Engagement Experience – A Toolkit \(Government Of Canada\)](#)
16. [Effective Community Engagement Workbook](#)
17. [Effective Public Engagement Through Strategic Communication](#)
18. [Engaging Ethno-Cultural Communities Toolkit - Action Dignity](#)
19. [Engaging Ethnocultural Communities: A Guide For Municipalities](#)
20. [Engaging Your Community: A Toolkit For Partnership, Collaboration, And Action](#)
21. [Equitable Engagement Blueprint](#) and [Planning Questions \(Durham\)](#)
22. [Equity, Diversity & Inclusion Handbook – DRAFT \(Hamilton\)](#)
23. [GARE Racial Equity Toolkit: An Opportunity To Operationalize Equity](#)
24. [Inclusion Lens: A Tool For City Of Edmonton Employees \(Edmonton\)](#)
25. [Inclusive Outreach And Public Engagement Guide \(Seattle\)](#)
26. [Involving Edmonton A Public Involvement Initiative](#)
27. [Local Government Action Guide: Healthy Community Engagement](#)
28. [MAPC Community Engagement Guide](#)
29. [NSHA Engagement Project Planning Template](#)
30. [NSHA Involving Patients And Citizens In Decision Making: A Guide To Effective Engagement](#)
31. [Participation Tools For Better Community Planning](#)
32. [Penn State Engagement Plan Worksheet](#)
33. [Planning Public Engagement: Key Questions For Local Officials](#)
34. [Port Moody Public Engagement Toolkit](#)
35. [Public Engagement Framework \(City Of Fort Saskatchewan\)](#)
36. [Public Engagement Framework \(City Of Kingston\)](#)
37. [Public Engagement Guide \(City Of Fort Collins\)](#)
38. [Public Engagement Guide \(Town Of Oakville\)](#)

39. [Public Engagement Guide Rural Municipalities Of Alberta](#)
40. [Public Engagement Guide: A Primer Newfoundland Labrador](#)
41. [Public Input Toolkit \(Government Of Alberta\)](#)
42. [Public Participation Strategy & Toolkit \(County Of Grande Prairie\)](#)
43. [Rethinking The Public Policy Process A Public Engagement Framework](#)
44. [Sparc BC Community Engagement Toolkit](#)
45. [Strengthening And Sustaining Public Engagement In Vermont: A Planning Guide For Communities](#)
46. [Strengthening Public Engagement In Edmonton](#)
47. [Tamarack Institute Community Engagement Planning Canvas](#)
48. [Tamarack Institute Index Of Community Engagement Techniques](#)
49. [Tiers Public Engagement Framework](#)

Attachment D

Planning & Development - Engagement Statistics 2018-2022

Shape Your City

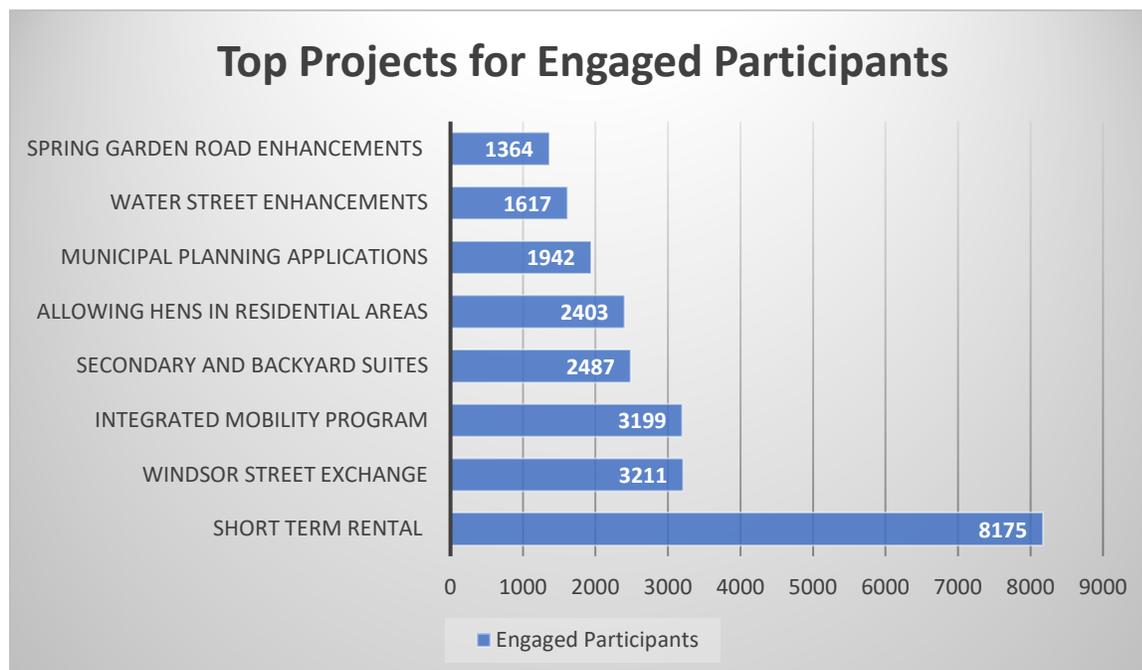
From January 1, 2018 to May 6, 2022

31,347 Engaged Participants – they filled in a survey, participated in a quick poll, placed a pin on a map or contributed to the ideas section.

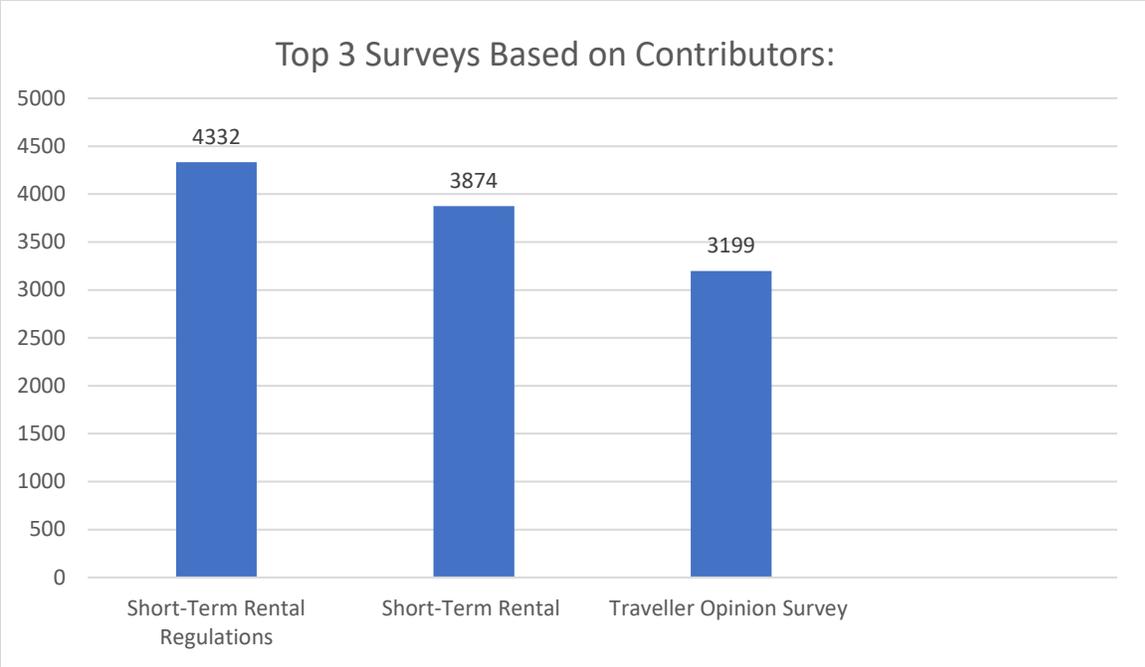
86,229 Informed Participants – they viewed a video or photo, downloaded a document, visited the key dates or FAQ page, visited multiple project pages and contribute to a tool (engaged).

168,276 Aware Participants – they visited at least one page

Top Projects for the engaged participants:



1. Short-Term Rental 8,175
2. The Windsor Street Exchange 3,211
3. Integrated Mobility Program 3,199
4. Secondary and Backyard Suites 2,487
5. Allowing hens in residential areas 2,403
6. Municipal Planning Applications 1,942
7. Water Street Enhancements 1,617
8. Spring Garden Road Enhancements 1,364



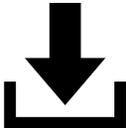
1. Short-Term Rentals Regulation 4,332
2. Short-Term Rental 3,874
3. Traveller Opinion Survey 3,199

Top 3 Places Based on Contributors:



1. Halifax Mobility Response: Streets 321
2. Windsor Street Exchange 25
3. Adaptation Survey: Map Hazards in Your Community 10

Top 3 Documents based on Downloads



1. Centre Plan – Package B – Land Use By-law 3,576
2. Building Requirements – Secondary Suites 3,552
3. Centre Plan – Package B – Secondary Municipal Planning Strategy 2,873

Top 3 Videos based on Views



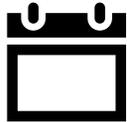
1. Spring Garden Road Enhancements 947 views
2. Water Street Enhancements Options Presentation 928 views
3. Imagine Spring Garden Road Functional Plan Options Simplified 259 views

Top 3 FAQ's Based on Views



1. Secondary & Backyard Suites 8,303
2. Spring Garden Road 1,019
3. Centre Plan 955

Top 3 Key Dates Based on Views



1. Centre Plan 1,074
2. Spring Garden Road 819
3. Herring Cove Road 606

Top 3 Traffic Sources – by Channel



1. Direct
2. Search Engine
3. Social

All these projects generate “What we Heard” reports to let the public know we’ve received their feedback. These reports are posted on the specific project pages within Shape Your City.

Citizens are encouraged to subscribe to Shape Your City to receive updates and links to new surveys as they get posted. There are currently over 5500 subscribers. Not all projects warrant correspondence to the subscriber list but below is a list of the planning projects, in the last 15 months, that have included an E-blast as part of the engagement.

Shape Your City Subscriber E-blasts

Topic	Date Sent	Emails delivered
Water Street Enhancements	March 11, 2022	5453
Short Term Rentals – Round 2	November 29, 2022	5486
Windsor Street Exchange – Phase 1	October 28, 2021	5518
Souls Harbour Site – West Chezzetcook	October 18, 2021	4679
Brunswick St & Rainnie Dr. Complete Streets	September 24, 2021	4990
Downtown Halifax Heritage Conservation District Plan	July 22, 2021	5587
Regional Plan Part 1	June 10, 2021	5612

Windsor Street Exchange Phase 1	April 21, 2021	5643
Portland St. & Cole Harbour Rd. Improvements Study	April 19, 2021	5062
	Total – 15 months	48,030
* Statistics are only available for the last 15 months from the E-blast provider		

Halifax.ca Engagement

On Halifax.ca/business/planning-development		
Year	Dates	Number of Unique Pageviews
2022	January 1 – May 17, 2022	46,549
2021	January 1 – December 31, 2021	139,684
2020	January 1 – December 31, 2020	128,274
2019	January 1 – December 31, 2019	93,888
2018	January 1 – December 31, 2018	81,252

We have created a number of project specific email addresses as another way to receive public feedback and give the public the opportunity to ask project specific questions. Here are some of the email addresses we have had created:

Project	Email address
Centre Plan	planhrm@halifax.ca
Regional Plan	regionalplan@halifax.ca
Affordable Housing	affordablehousingprogram@halifax.ca
Solar City	solarcity@halifax.ca
Backyard Hens	backyardhens@halifax.ca

Public Information Meetings (PIMS) & Open Houses

At Planning and Development events (public information meetings, presentations, and open houses) attendee evaluation surveys are available for those who wish to fill them out. They ask about the timing of the meeting, clarity of the information presented, if there was adequate opportunity for feedback, appropriate meeting format, demographics and postal code. In 2019, the evaluation survey participation rate for the Public Information Meetings was 13.5%. All public meetings stopped in March of 2020. Here are the results from Public Information Meetings in 2019:



Meetings

January 1, 2018 – December 31, 2021

Year	In-person PIMs	In-person attendees	Virtual PIMs	Virtual attendees	Source
2021	0	--	7	193	
2020	8	Approx. 100	3	36	
2019	34	1,000+	--	--	Business Plan Presentation
2018	24	1,300+	--	--	Business Plan Presentation

Planning and Development often uses regular mail to share information/meeting/ hearing times with neighbours near the particular site. Here's a synopsis of the number of postcards/ letters mailed since January 2018.

Planning Public Engagement (January 2018 to May 2022) Number of Letters Mailed	
Public Information Meeting / Open House	Public Hearing
40,426	40, 273

Virtual online meetings – Teams Meetings – 2020-2022

Name of Meeting	Date	# of Attendees
Akoma - Case 21875 - Development of the former NS Home for Coloured Children (NSHCC)	October 21, 2020	25
Windsor Street Exchange Redevelopment Project – Africville Community Consultation #1	November 12, 2020	7
Windsor Street Exchange Redevelopment Project – Africville Community Consultation #2	November 13, 2020	0
Centre Plan – Package B – Neighbourhoods - Established Residential - Virtual Meeting #1	November 16, 2020	18

Centre Plan - Package B - Neighbourhoods - Established Residential - Virtual Meeting #2	November 23, 2020	11
Centre Plan – Package B – Neighbourhoods - Established Residential - Virtual Meeting #3	December 1, 2020	7
St. Patrick’s Alexandra School	November 19, 2020	25
Windsor Street Exchange Redevelopment Project – Advocacy Stakeholder Meeting – Existing Conditions – Phase 1	April 7, 2021	6 groups
Windsor Street Exchange Redevelopment Project – Halifax Utilities Coordinating Committee – Existing Conditions – Phase 1	April 8, 2021	6 Utilities represented
Windsor Street Exchange Redevelopment Project – adjacent property owners	April 28, 2021	7 property owners/businesses
Windsor Street Exchange Redevelopment Project – Public Open House – Existing Conditions -Phase 1	April 29, 2021	30
Windsor Street Exchange Redevelopment Project – Advocacy Stakeholder Meeting - Functional Design Concepts – Phase 2	October 15, 2021	5 Groups
Windsor Street Exchange Redevelopment Project – Functional Design Concepts – Phase 2	October 27, 2021	43
Portland Street and Cole Harbour Road Functional Planning Study	April 7, 2021	161
Regional Plan – social policy	June 11, 2021	4
Regional Plan - housing	June 14, 2021	14
Regional Plan - climate change	June 15, 2021	9
Regional Plan - environment	June 15, 2021	7
Regional Plan – mobility	June 16, 2021	6
Regional Plan – long range planning	June 16, 2021	4
Southdale	February 7, 2022	90
Affordable Housing Grants Virtual Q & A	October 27, 2021	12
Urban Design Awards	June 9, 2021	40
Proposed Downtown Halifax Heritage Conservation District - Public Engagement Session	July 29, 2021	8
Call for Artists - African Nova Scotian Interpretive Panel	June 30 ,2021	5

Social Media

YouTube - January 1, 2018 – May 10, 2022 – Who’s watching?			
	72 Videos in the Planning and Development Playlist	40,100 YouTube Views	2363.3 Hours of Viewing
Reddit – Ask me anything (AMA) session – December 2020			
 reddit	65 Comments generated by our post	51 “Upvotes”	24 hours Pinned to the top of the Halifax subreddit

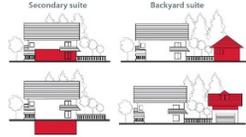


TWITTER – Most Popular Tweets

Date	Impressions	Photo	Tweet Copy
January 2022	7966		Do you have backyard hens? Are you interested in keeping backyard hens in a residential area? We've posted a new webpage with tips on caring for the health & safety of your hens, the rules for keeping your hens & a link to register your hens. halifax.ca/home-property/... pic.twitter.com/4HUbRnTetD
May 2021	57,800		Shannon Park Development-We're seeking your feedback on a development proposal for a new residential community on the former Shannon Park lands located off Princess Margaret Blvd, Iroquois Dr. & Nootka Ave in Dartmouth. Survey available until June 7, 2021. shapeyourcityhalifax.ca/planning-appli... pic.twitter.com/XwbNC9qONS
November 2020	18,800		Reminder: virtual meeting happening today @ noon. Spend your lunch hour with us talking about neighbourhoods in the Centre Plan area. Ask your questions to a planner with our online Q&A. Hope you can join us. Here's the meeting link. teams.microsoft.com/l/meetup-join/... pic.twitter.com/FbOensfYOc
September 2019	80,800		On Wed. Sept. 18, 2019 pop by Halifax Central Library lobby (9:30-11:30 am) or Scotia Square Centre court (12:30-2:30 pm) to see final schematic design for Spring Garden Rd enhancements. This final concept will go to tender for detailed design. #ImagineSGR shapeyourcityhalifax.ca/spring-garden-... pic.twitter.com/kJnyOSTS3p
November 2018	38,490	 <small>Can we use this innovative & and sophisticated solution (from #Maine) at the #Halifax(Ferry Terminal)? @shiplanning @BIKEHX</small>	What do you think? Like it? Would people use it? https://twitter.com/billthebiker/status/1067489734191124480 ...



Top Facebook Posts

Date	Top Post Reach	Image	Post
January 2022	15,911		<p>Do you have backyard hens? Are you interested in keeping backyard hens in a residential area? We've posted a new webpage with tips on caring for the health & safety of hens, the rules for keeping hens, information on development permits for chicken coops & a link to register your hens.</p> <p>https://www.halifax.ca/home.../animal-services/backyard-hens</p>
October 2021	12,709		<p>Thanks to everyone who attended the virtual open house for the Windsor Street Exchange Redevelopment project! Miss the meeting? View the recording https://www.shapeyourcityhalifax.ca/windsor-street.... You can also complete the online survey until November 17, 2021 & use the Q&A Forum to ask questions of the project team.</p>
August 2020	51,731		<p>Backyard suites, are separate free-standing buildings, either built ovetop an accessory structure like a garage, or simply on their own. They are often referred to as granny suites, carriage flats and could be in the form of a tiny house.</p> <p>Secondary and Backyard suites can be used by aging parents or adult children or can be used as rental units for the general public. The diagram below shows typical arrangements on a residential property.</p> <p>Get more information at https://www.shapeyourcityhalifax.ca/allowing-secondary-suit...</p>

<p>August 2019</p>	<p>20,418</p>		<p>We've installed bollards at the intersection of Agricola & Charles (Halifax) as well as at Ochterloney & Wentworth (Dartmouth) to improve pedestrian safety by reducing crossing distances. Visit our webpage for more information on our tactical urbanism projects.</p>
<p>October 2018</p>	<p>Data no longer available</p>		<p>Downtown Dartmouth Open House. Live stream of video.</p>