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TO:	Chair and Members of Audit & Finance Committee
FROM:	Cathie O'Toole, Chief Administrative Officer
DATE:	January 21, 2025
SUBJECT:	**Action Plan from the Diversity and Inclusion Audit**

INFORMATION REPORT

ORIGIN

December 11, 2024 Audit & Finance Standing Committee motion (Item 13.1.1)

MOVED by Councillor Cleary, seconded by Councillor Morse THAT the Audit and Finance Sanding Committee request the Chief Administrative Officer develop an action plan to address the recommendations from the Diversity and Inclusion Audit and report back to the Audit and Finance Standing Committee in six months.

BACKGROUND

In June 2018, HRM adopted its Diversity & Inclusion Framework with five corporate goals:

1. Inclusive public service

2. Safe, respectful and inclusive work environment

3. Equitable employment

4. Meaningful partnerships

5. Accessible information and communication

On December 5, 2024, the Auditor General submitted a Diversity & Inclusion Audit to the Municipality pursuant to Section 50(2) of the *Halifax Regional Municipality Charter*. The audit evaluated:

- Progress by the Office of Diversity & Inclusion / African Nova Scotian Affairs (D&I/ANSAIO) and six business units in advancing those goals

- The effectiveness of training, oversight, planning, reporting, and data collection processes

While the audit found many positive initiatives—new strategies, training modules, and policies—it also identified gaps in training completion (38% of new hires had not completed mandatory D&I overview),

lack of central oversight, inconsistent business unit implementation planning, and insufficient performance measures and data systems. HRM accepted all eight recommendations and formed three cross functional working groups to codesign the response.

DISCUSSION

To address the audit recommendations efficiently, three working groups were established with staff from the D&I/ANSAIO Office:

- **Group 1 (Recommendations 1 & 2 – Training):** Develop a self paced online D&I Overview module and an automated probation period reporting and notification system for hiring managers.

- **Group 2 (Recommendations 3–5 – Oversight & Planning):** Create a goal-setting template for business units, institute monthly D&I check-in meetings, and define clear roles for D&I/ANSAIO Advisors, Champions, and Coordinators.

- **Group 3 (Recommendations 6–8 – Reporting & Data):** Identify key performance indicators (KPIs), combine reporting templates and design a Power BI dashboard for streamlined data visualization.

These efforts have produced:

- A comprehensive **Action Plan** (Attachment 1) detailing 12 discrete actions, status, and anticipated completion dates.

- A **Summary Table** (below) tracking progress at a glance (timeline based on fiscal quarters)

#	Recommendation	Status	Anticipated Completion
1	The office of Diversity & Inclusion should review and assess the frequency of diversity and inclusion training to determine if it can support training all new hires. If not, plans to address the gaps should be developed and implemented	**In progress**	**Q2 2025**
2	HRM should develop a process that helps ensure all new hires complete corporate or business-unit-specific mandatory diversity and inclusion training	**In progress**	**Q2 2025**
3	HRM should assign responsibility to oversee and monitor corporate implementation of the Diversity & Inclusion Framework	**In progress**	**Q2 2025**
4	HRM should implement a process to periodically assess ongoing work across the municipality under each framework goal and use this information to help manage and prioritize work accordingly.	**In progress**	**Q3-Q4 2025**
5	HRM should define expectations for how business units document their diversity and inclusion actions and initiatives, including how they align with the corporate framework goals, and provide guidance to business units on implementation.	**In progress**	**Q2 2025**
6	HRM should determine what level of reporting is required to monitor Diversity & Inclusion Framework implementation and provide business units with guidance on what information is required to support this process.	**In progress**	**Q2 2025**
7	HRM should identify if there are opportunities to streamline annual reporting (number of reports, quality and quantity of information) on progress and performance towards the corporate Diversity & Inclusion Framework goals and provide business units with guidance on how to report on their diversity and inclusion efforts.	**In progress**	**Q3-Q4 2025**

8	HRM should determine what data is necessary to assess Diversity & Inclusion Framework process and implement a process to regularly collect this data. This information should be collected and maintained by those responsible for oversight of the Diversity & Inclusion Framework.	**In progress**	**Q2 2025**

FINANCIAL IMPLICATIONS

No financial implications at this time.

COMMUNITY ENGAGEMENT

No community engagement was required.

LEGISLATIVE AUTHORITY

Halifax Regional Municipality Charter, **S.N.S. 2008, c. 39:**

50(2)   The Auditor General shall examine, in the manner and to the extent the Auditor General considers necessary, the accounts, procedures and programs of the Municipality …

Audit & Finance Standing Committee Terms of Reference:

1. (1) The purpose of the Audit and Finance Standing Committee is to provide advice to the Council on matters relating to audit and finance.

(2) The other purposes of the Committee are to:

(a) fulfill the requirements as outlined in Section 48 of the HRM Charter; and

(b)assist the Council in meeting its responsibilities by ensuring the adequacy and effectiveness of financial reporting, risk management and internal controls.

ATTACHMENTS

Attachment 1 – D&I audit actions plan (detailed actions, current status, and anticipated completion dates for Recommendations 1–8)

Report Prepared by: Shehab Matar, Immigrant Services Advisor, Office of Diversity & Inclusion/ANSAIO — 782.641.3173

ACTION PLAN RESPONSE TO MANAGEMENT OF DIVERSITY AND INCLUSION AUDIT

D&I Office

HALIFAX REGIONAL MUNICIPALITY

Action Plan Response to D&I Audit

Summary Table (timeline based on fiscal quarters)

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8	HRM should determine what data is necessary to assess Diversity & Inclusion Framework process and implement a process to regularly collect this data. This information should be collected and maintained by those responsible for oversight of the Diversity & Inclusion Framework.	In progress	Q2 2025

Recommendation 1

The Office of Diversity & Inclusion should review and assess the frequency of diversity and inclusion overview training to determine if it can support training all new hires. If not, plans to address the gaps should be developed and implemented.

Management Response
HRM accepts this recommendation. The Office of Diversity and Inclusion has been engaged with the Training Division in Human Resources to develop an online module we expect to be available in early 2025.

Action Plan for Recommendation 1
1.1 **Collaborate with Talent Development** to develop a self-paced online Diversity & Inclusion (D&I)

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Overview training module to improve accessibility and ensure all new hires can meet their mandatory training requirement.

- **Current status:** First draft of the online module is ready and being reviewed.

- **Anticipated completion date:** Q2 2025

1.2 **Launch the new online Diversity and Inclusion Overview as a mandatory training module for all staff.** The existing in-person module will be revised into an expanded offering that includes all content from the online module, along with additional material for deeper engagement. This approach supports flexible learning for staff with scheduling or operational constraints.

- **Current status:** In progress

- **Anticipated completion date:** Q2 2025

Recommendation 2

HRM should develop a process that helps ensure all new hires complete corporate or business-unit-specific mandatory diversity and inclusion training.

Management Response
HRM accepts this recommendation. The Office of Diversity and Inclusion will work with Human Resources to develop a plan and process to ensure all new hires participate in the mandatory training.

Action Plan for Recommendation 2
2.1 **Work with IT and HR Systems** to develop a simplified and clear report to track new hires' completion of mandatory training, accessible to leaders.

- **Current status:** Complete – report edits have been reviewed and approved; pending publication after SAP change freeze.

- **Anticipated completion date:** Q2 2025

2.2 **Customize probationary-period reminders** in SuccessFactors (EC) to hiring managers, including D&I training expectations and a direct hyperlink to the mandatory training resources.

- **Current status:** Development complete – testing and approvals finalized; pending release.

- **Anticipated completion date:** Q2 2025

2.3 **Automate notifications** tied to each new employee's probationary period, directing reminders to hiring managers to reinforce accountability for training completion.

- **Current status:** Migration complete; notifications in final review.

- **Anticipated completion date:** Q2 2025

Recommendation 3

HRM should assign responsibility to oversee and monitor corporate implementation of the Diversity & Inclusion Framework.

Management Response
HRM accepts this recommendation. The Office of Diversity and Inclusion will identify a system to oversee and monitor corporate implementation.

Action Plan for Recommendation 3
3.1 **Deploy the D&I Reporting Template**—with instructions on roles, responsibilities, and meeting formats—to guide D&I Advisors, Champions, and Coordinators in monthly oversight meetings. The first meeting each fiscal year will focus on pre-planning annual actions; subsequent monthly meetings will review checkpoints on actions, results, and KPIs.

- **Current status:** Template created; D&I Advisors have begun scheduling monthly meetings with Champions and Coordinators.

- **Anticipated completion date:** Q2 2025

Recommendation 4

HRM should implement a process to periodically assess ongoing work across the municipality under each framework goal and use this information to help manage and prioritize work accordingly.

Management Response
HRM accepts this recommendation. Diversity and Inclusion Advisors will play an active part in the assessment process of the corporate monitoring of the D&I Framework.

Action Plan for Recommendation 4
4.1 **Use the D&I Reporting Template** in quarterly checkpoint meetings (Q1: April, Q2: July, Q3: October, Q4: January) to track and update business-unit actions, results, and KPIs. These updates will feed into the Annual D&I Framework report to Regional Council.

- **Current status:** Template in use; Advisors meeting monthly with Champions and Coordinators.

- **Anticipated completion date:** Q3-Q4 2025

Recommendation 5

HRM should define expectations for how business units document their diversity and inclusion actions and initiatives, including how they align with the corporate framework goals, and provide guidance to business units on implementation.

Management Response
HRM accepts this recommendation. As part of the 2025/26 business plan, Business Units will be asked to describe their planned D&I activities in alignment with the framework. Diversity and Inclusion Advisors will work with Business Units to develop goals and objectives.

Action Plan for Recommendation 5
5.1 **Integrate the Reporting Template** into business-unit annual planning. During quarterly meetings, Advisors will ensure D&I goals are clearly documented, aligned to the framework, and tracked via the template (actions, results, KPIs).

- **Current status:** Template shared; Advisors are meeting with senior leadership to embed D&I goals in annual planning.

- **Anticipated completion date:** Q2 2025

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Recommendation 6

HRM should determine what level of reporting is required to monitor Diversity & Inclusion Framework implementation and provide business units with guidance on what information is required to support this process.

Management Response
HRM accepts this recommendation. The Office of Diversity and Inclusion will identify mechanism(s) to support Business Units to be able to better report on all D&I strategies.

Action Plan for Recommendation 6
6.1 Creation of a reporting template, which includes instructions on what information should be collected and reported to align with D&I goals and their associated KPIs.

- **Current Status:** Template has been created, in the review stage with IT department.

- **Anticipated Completion:** Q2 2025

Recommendation 7

HRM should identify if there are opportunities to streamline annual reporting (number of reports, quality and quantity of information) on progress and performance towards the corporate Diversity & Inclusion Framework goals and provide business units with guidance on how to report on their diversity and inclusion efforts.

Management Response
HRM accepts this recommendation. Office of Diversity and Inclusion will review existing annual reporting requirements and provide business units with updated reporting guidelines.

Action Plan for Recommendation 7
7.1 **Create a reporting template** that combines annual KPI collection and narrative reporting into a single user-friendly survey.

- **Current status:** Combined annual reporting and KPIs into a reporting template.

- **Anticipated completion date:** Q3-Q4 2025

7.2 **Develop a Power BI dashboard** to visualize reporting results and streamline data management for business units and D&I Advisors.

- **Current status:** Pending approval of the reporting template.

- **Anticipated completion date:** Q3-Q4 2025

Recommendation 8

HRM should determine what data is necessary to assess Diversity & Inclusion Framework progress and implement a process to regularly collect this data. This information should be collected and maintained by those responsible for oversight of the Diversity & Inclusion Framework.

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Management Response

HRM accepts this recommendation. The Office of Diversity and Inclusion commits to identifying KPIs that will measure the success and impact of the D&I Framework.

Action Plan for Recommendation 8

8.1 **Identify and finalize key KPIs** (e.g., training completion rates, number of initiatives, representation metrics) to measure the D&I Framework's impact.

- **Current status:** KPIs identified and merged into the reporting template, IT review in progress.

- **Anticipated completion date:** Q2 2025

8.2 **Implement a regular data-collection process** via the reporting template and Power BI dashboard to maintain, analyze, and report on KPI trends throughout the year.

- **Current status:** Data-collection mechanism in pilot via reporting template; dashboard design underway.

- **Anticipated completion date:** Q2 2025