Community Engagement Charter Toolkit

Government of South Australia
Department for Housing
and Urban Development

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Overview

The Community Engagement Charter toolkit helps practitioners fulfil their engagement obligations when preparing or amending a designated instrument.

This toolkit provides step-by-step guidance together with a range of templates, case studies and examples to help develop the best engagement approach for different types of projects, policies or schemes.

Practitioners can use this toolkit to plan, implement and report on mandatory engagement with South Australians. Each subsection of the toolkit contains the headings "Why this is important" and "How to do it". These subsections provide proponents and designated entities with direction on engagement best practice.

This toolkit should be read in conjunction with the Community Engagement Charter (the Charter) when designing, implementing and reviewing community engagement.

When to use this toolkit

Under the *Planning, Development and Infrastructure Act 2016* (the PDI Act), practitioners must apply Part A of the Charter when preparing or amending any of the four designated instruments under section 73:

- State Planning Policies
- Regional Plans
- Planning and Design Code
- Design Standards

Practitioners must use Part B of the Charter when seeking a 'complying change' under section 75 of the PDI Act. A 'complying change' is a change to the Planning and Design Code (the Code) (i.e. rezoning land) that aligns with a recommendation in the Regional Plan for that area.

Requirements of the Charter must also be met when creating or amending an Infrastructure Scheme.

Learn more about the Community Engagement Charter.

PART A – AMENDMENT OF DESIGNATED INSTRUMENTS UNDER SECTION 73 OF THE ACT

Step 1 – prepare to engage

Step 1 checklist:

1. Determine your engagement purpose, background and objectives
2. Determine your stakeholders' scope of influence
3. Identify your stakeholders and the required level of engagement
4. Ensure your engagement meets the Charter principles

1.1   Determine your engagement purpose, background and objectives

As a project team, discuss what your engagement purpose is, the background and your objectives. These will ultimately form part of your engagement plan.

You may also consider developing key messages that can be adapted from your purpose and objectives.

Why this is important

- To ensure there is agreement on what is being engaged on and why.
- Engagement activities start from this point. To properly plan your engagement, you need to know what engagement has already been done, so you can decide where to direct your effort.
- Defining what you are engaging on will enable you to craft your engagement purpose, objectives and develop the key messages for engagement.

How to do it

Define what you are doing:

- What planning policy, strategy or scheme are you engaging on?
- Is the policy, strategy or scheme new, or being amended?
- Why is the engagement being initiated, and what are the:
  o key drivers?
  o issues to be resolved?
- opportunities to be resolved?
- Is there any relevant background or history to consider?
- Which location or area does the proposal apply to?

Subject to the designated instrument you are engaging on, your engagement approach will vary in relation to the:

- participation required, as outlined in the [IAP2 Public Participation Spectrum](#)
- impact the decision may have on stakeholders and communities; and/or
- degree of influence stakeholders and communities have on the decision.

Example

Engagement purpose	To engage on an amendment to the Code
Engagement background	The area in question is currently zoned as Residential and is adjacent a major road transport corridor. The State Planning Policies and Regional Plan seek to manage the impacts of population growth by enabling residential growth through infill development. The area in question is characterised by low density housing stock. This, along with the area's proximity to transport options, provides the opportunity for infill and higher density residential development. As such, it is proposed that the zone be amended from Residential to Urban Corridor, which allows for higher densities of development.
Engagement objectives	• To gain input from community and stakeholders to inform the amendment • To obtain localised knowledge and perspective to inform the amendment • To ensure stakeholders can provide early input to inform the amendment • To ensure that all affected and interested stakeholders have the ability to provide input and that engagement delivery is tailored to those stakeholders • To provide easy to understand written and graphic materials that explain and demonstrate the impacts of the proposed change on the scale of built form in the area

1.2 Determine your stakeholders' scope of influence

Determine the scope of influence of all affected communities/stakeholders. Highlight what aspects of the proposal are negotiable (open to change) and those which are not negotiable (not open for change).

Why this is important

- It is important that communities understand what aspects of the proposal they can influence and those they cannot.

- Scope of influence refers to what stakeholders can do something about. Determining the scope of influence will help you identify engagement activities in Step 2 (Plan your engagement). It will also help you to proportionally engage with the different cohorts in the impacted communities.

- The scope of influence should be clearly stated in all communication materials related to the engagement.

How to do it

- You need to identify the extent to which communities can influence the outcome when they participate in engagement activities.

- There may be aspects of a designated instrument that are negotiable and non-negotiable.

- Negotiable aspects of the proposal can be influenced. For example, the specific conditions within a zone amendment.

- Non-negotiable aspects cannot be influenced. For example, the geographic extent of a zone amendment or legislative requirements.

1.3   Identify stakeholders and their required level of engagement

Conduct a stakeholder and community analysis to identify stakeholders that you need to engage.

Consider how your identified stakeholders may need to be accommodated in the design of your engagement.

This section will detail some of the cohorts and demographics that should be considered when developing your engagement. Specific information is also provided in relation to the engagement of statutory boards and committees.

Why this is important

Once the project team have agreed on:

- who your stakeholders are;

- their interest in the proposal; and

- the level of participation they will have;

you will be able to determine the 'reach' of your engagement, and the activities required.

Relevant councils should be engaged and liaised with, as they understand the key communities and issues within their local areas.

Stakeholder categories can help to identify the relevant stakeholders. Categories can include:

- state and local government

- community/interest groups

- industry

- statutory boards and committees

- adjacent property owners or occupiers

It is important to note that the Charter makes specific reference to considering the engagement and communication needs of the following community groups:

- First Nations people;

- young persons;

- persons from culturally and linguistically diverse backgrounds;

- persons with a disability and/or neurodivergence; and

- businesses, workers and employers.

These groups should be given appropriate, proportionate and reasonable consideration in the stakeholder analysis.

Statutory boards and committees

Under the related legislation, where a proposal may directly affect the activities or responsibilities of a statutory board or committee, the Charter requires the relevant board/s or committee/s to be:

- notified in writing; and

- consulted on the proposal,

prior to a draft being released for community engagement. This should be noted in the stakeholder analysis.

For example, the *Landscape South Australia Act 2019* requires regional landscape boards to participate in a Code Amendment as appropriate. While this example is specifically outlined in legislation, there may be other circumstances where it is appropriate for other boards to be consulted.

The stakeholder table in the following chapter lists some of the statutory boards and committees which currently exist across SA. The list is not exhaustive, and others should be considered as necessary.

How to do it

To determine the level of engagement required, the [IAP2 Public Participation Spectrum](#) is a recommended tool, as it is well known and used by councils.

The IAP2Spectrum is also the foundation of the South Australian Government's [Better Together](#) program.

There are two steps for identifying the levels of participation for your engagement:

1. Identify stakeholders and/or communities who may have an interest or be impacted by the proposal and what the interest or impact on them is

2. Identify the level of engagement required for each stakeholder group based on the IAP2 spectrum above

Tools

- [IAP2 Public Participation Spectrum](#)

- [Template - Stakeholder analysis tool (DOCX, 234 KB)](#)

- [Planning Instruments and examples of level of engagement (PDF, 229 KB)](#)

1.4 Ensure your engagement meets the Charter principles

The Charter principles seek engagement that is genuine, inclusive and respectful and fit for purpose.

Using these principles, consider the needs of your stakeholders and how your engagement can be designed to suit them.

Why this is important

Every community is unique. You may need to work with stakeholders from different cultural, professional or religious backgrounds. Considering the particular needs or preferences in how your stakeholders engage will help maximise the engagement outcomes.

Consider what communications mediums or tools can be used to make your engagement contemporary, accessible and 'fit for purpose'.

As mentioned, the Charter makes specific references to the engagement and communication needs of the following community groups:

- First Nations people;
- young persons;
- persons from culturally and linguistically diverse backgrounds;
- persons with a disability and/or neurodivergence; and
- businesses, workers and employers.

These groups should be given appropriate, proportionate and reasonable consideration in engagement planning.

How to do it

After you identify your stakeholders and communities, consider how the Charter principles may apply to them.

It may be useful for a to utilise Australian Bureau of Statistics Census data, or local council data sets to gain a more accurate picture of the local community who may be impacted by a proposal.

Understanding your stakeholder's demographics will assist in designing engagement that is inclusive, respectful and fit for purpose.

So that stakeholders have the best opportunity to contribute to the engagement, remember to consider:

- cultural needs
- age-related needs or preferences
- language needs
- preferred means of communication
- accessibility requirements for example physical ability, timing and location of engagement
- existing schedules or forums for stakeholder meetings such as meeting frequency of councils, boards or community groups

These considerations will inform the engagement activities developed in Step 2 – Plan your engagement.

Tools

- [Principles in Action (PDF, 442 KB)]

- Considerations for engaging with diverse stakeholder groups - table below:

Stakeholder	Engagement considerations and avenues
First Nations People	Consider consulting with: • Aboriginal Advisory Committees and State Agencies • Traditional Owners and Aboriginal and Torres Strait Islander organisations • State First Nations Voice (Local and State) and associated advisory committees
Young persons (Generally aged between 12 and 25)	Consider: • Youth focused media strategies • Youth information sessions • Targeted engagement with schools and university associations, clubs and unions • Targeted engagement with Youth Advisory Committees (in both State and Local Governments) • Targeted engagement with youth services or youth organisations • In-situ engagement - talking with young people at youth focused events, activities or locations
Persons from culturally and/or linguistically diverse backgrounds	Consider: • Targeted engagement with multicultural community groups and/or representatives or leaders • Offering translation of engagement materials • Using plain and clear written communications • Using maps or visual representations
Persons with a disability and/or neurodivergence	Consider: • Providing people with an opportunity to advise what their access needs are for an information session and then either meet these or enable them to attend virtually • Conducting engagement sessions on Teams/Zoom with closed captioning • Providing a clear agenda or meeting schedule - make the purpose of engagement activities clear in advance • Using plain and clear written communications • Using maps or visual representations • Consulting with advocacy and advisory groups. Advocacy and advisory groups: • Office for Autism • Autism SA • Inclusive SA • Disability advocacy organisations • JFA Purple Orange

Stakeholder	Engagement considerations and avenues
Business, workers and employers	Consider: • How your proposal will impact local business activities • Scheduling face-to-face sessions at different times of the day/week to be able to reach a broader section of this community – such as shift workers, those who run a business during the day or travel for work Contact groups: • Unions, employee associations and advocates • South Australian Business Chamber • Industry associations
Statutory boards and committees	• Landscape Boards • Green Adelaide Board • Coast Protection Board • Native Vegetation Council • Outback Communities Authority • Pastoral Board • Stormwater Management Authority Board

Step 2 – plan your engagement

Step 2 checklist:

1. Identify stages of engagement and engagement activities
2. Determine your capacity to deliver the engagement
3. Determine how to evaluate the success of the engagement
4. Prepare your engagement plan
5. Get approval from the State Planning Commission, if required

2.1   Identify stages of engagement and engagement activities

Determine the stages of engagement required for your proposal and the approach to each stage (activities, resourcing and timing).

When developing your engagement approach remember to:

• be clear about your stakeholders' scope of influence in relation to the decision being made

• ensure that the engagement techniques used match the scope of influence.

The below section includes guidance on mandatory requirements for engagement, timeframes for statutory consultation periods, and specific advice on the role statutory boards can play in engagement.

Why this is important

The Charter encourages engagement at an early stage, and then scaled back consultation when dealing with a settled or advanced policy.

Your engagement is likely to happen in multiple stages, i.e. early in the proposal's development and then later when the draft proposal is prepared.

For each stage, the stakeholders and level of engagement may change.

For example, you may involve or collaborate with directly impacted residents in the development of a draft proposal in Stage 1 and then consult again on the draft proposal at Stage 2. The wider community may only be consulted as part of Stage 2.

How to do it

While the Charter provides for flexibility in the delivery of an engagement, it's important to make sure that the Charter principles and any statutory obligations are adhered to in your approach.

When determining the stages of engagement, consider that the engagement will happen over multiple stages and the aim of each stage of engagement may differ. For example: early input in development of a proposal vs. feedback on a draft proposal.

The level of engagement for each stage may vary. And timeframes for each stage may influence your approach (see the below table for more on this).

When deciding on engagement activities, you need to consider a range of elements, including how:

- the Charter principles will influence each engagement activity, see Charter principles in action (PDF, 442 KB)
- the characteristics of your stakeholders will influence the types of venues, timing and communication you utilise

You can tailor your engagement methods based on your stakeholder analysis, completed as part of Step 1:

- If you are only **informing** your stakeholders of a change, then a public press advertisement or letter may be suitable.
- However, if you are **consulting** your stakeholders on a change, you may invite written submissions or hold a community event.

Choose activities that gather the level of information needed to develop the proposal and set the right level of community expectation. For example:

- a workshop for people to contribute diverse ideas where there is a lot of room to move in a proposal
- where there is less room to move, you may seek feedback on particular options only.

Educational/support materials help people understand a proposal so that they can provide informed feedback. Use plain English and consider visual tools or scenarios to demonstrate development outcomes.

Make sure you make it clear for people how feedback will be, or has been, used in development of the proposal.

Mandatory requirements for engagement

The *Planning, Development and Infrastructure Act 2016* identifies several mandatory requirements for engagement which is subject to the Charter. These mandatory requirements must be outlined in the relevant engagement plan.

Consultation category	Mandatory requirement
Proposals that are specific to a particular council or councils (where a council did not initiate the proposal)	Council(s) must be directly notified of the proposal and consulted
Proposals that are generally relevant to councils	The Local Government Association must be notified in writing and consulted
A proposal to enter a site within the Planning and Design Code as a place of local heritage value	The owner of the land on which the site is situated must be directly notified in writing of the proposal and consulted for a minimum of four weeks
A proposal to amend the Planning and Design Code to include any heritage character or preservation policy that is similar in intent or effect to a local heritage listing	The owner of the land on which the place is situated, must be directly notified in writing of the proposal and consulted for a minimum of four weeks
Infrastructure delivery scheme	Land-owners affected by the scheme must be directly notified in writing

Timeframes for the statutory consultation periods

While engagement on a proposal may occur in several different stages, there is a statutory consultation period that must occur in relation to the amendment of a designated instrument (most commonly amendments to the Code).

It's difficult to apply a 'one size fits all' timeframe for consultation periods since each is dependent on various factors including the size of the site, location, and any engagement activities that may have been undertaken with affected parties previously.

Generally, private, proponent-led Code Amendments for rezonings run a six-week statutory consultation period. However there may be circumstances where a shorter period is appropriate.

Some draft Code Amendments are subject to consultation periods of up to 12 weeks, but these are typically for State Planning Commission-led proposals which can be statewide and/or have a significant level of scope and complexity.

When deciding on the timeframe for a consultation period, you should proactively liaise with the relevant local council/s and be cognisant of their reporting timeframes and meeting schedules, noting that council submissions usually need to be signed off by senior staff and the elected body.

Councils play an important role in contributing local expertise on technical aspects of a proposal as well as representing the concerns of their local community.

As such, their submission is usually of significant importance to the Commission and Minister in considering the final proposal for approval. An early 'heads up' to a council on an upcoming consultation period is recommended, particularly if a consultation period of six weeks or less is proposed.

Finally, the chosen consultation timeframe should reflect the the potential impact on the affected communities - whether development rights could be adversely affected or whether the proposal could be controversial.

Tools

- [Planning instruments and examples of level of engagement (PDF, 229 KB)](#)

- [Charter principles in action (PDF, 442 KB)](#)

- [Types of engagement activities at different levels (PDF, 114 KB)](#)

2.2 Determine your capacity to deliver the engagement

Consider your organisation's capacity to deliver the proposed engagement plan.

Why this is important

It is important to ensure that you have the resources to implement your engagement plan (e.g. people, skills, finances, materials, venues).

Expensive engagement doesn't necessarily mean good engagement. What is important is that there is adequate opportunity for people to provide input and that they have access to the information and avenues they need to provide informed feedback.

How to do it

Reflecting on your organisation's readiness to deliver an engagement will help identify areas that need more support or resourcing; the good engagement work that is already happening; and whether you need to amend your plan accordingly.

Similarly, as the engagement plan is implemented, it may be subject to change as new issues or ideas emerge.

Key questions to ask include

- What resources do we have available to implement this engagement plan (both financial and staffing)?

- Do we have the internal capacity to deliver this engagement process (i.e. the skills and expertise)?

- How else might we resource this engagement plan?

- How do we build our internal capacity to deliver this (or any future) engagement plans?

- Do we need to adjust the engagement plan to match our available capacity?

- Are there any opportunities to collaborate and share the responsibilities for engagement?

Tools

- [Measuring success tool (PDF, 379 KB)](#)

2.3　Determine how to evaluate the success of the engagement

When planning your engagement, decide how you can measure the success of your engagement so it can be adequately assessed to show that you have met the principles of the Charter.

Why this is important

Evaluation data will need to be included in your engagement report when you submit your initial or amended planning instrument to the Minister for Planning for a final decision.

The State Planning Commission is responsible for reviewing and ensuring that all relevant engagements have met the requirements of the Community Engagement Charter.

How to do it

There are minimum performance indicators for evaluating an engagement against the Charter's principles and these indicators must be listed in the Engagement Plan (See the [measuring success tool (PDF, 379 KB)](#)

Outline how you will measure a successful engagement. Your measures will probably include a mixture of:

- quantitative, such as:
  - number of submissions
  - website hits
  - number of workshop participants

- qualitative, such as descriptions of:
  - activities undertaken
  - how feedback influenced the policy, strategy or scheme.

Your measures should focus on the success of the engagement process itself and ask:

- did the people who wanted to have input get to?
- was the engagement process accessible?
- did people have the information they needed to provide good feedback?

Good engagement powers good planning outcomes. Measuring planning outcomes is an important longer-term process, but not the focus of this guide.

If further evaluation measures are proposed these should be added to the engagement plan and the final evaluation provided in the engagement report.

Check against the [Charter principles in action (PDF, 442 KB)](#) and assess how well your engagement plan addresses them, to ensure you are meeting the requirements of the Community Engagement Charter.

Make any adjustments to ensure the principles are adequately represented, along with all statutory requirements.

Tools

- [Template engagement plan (DOCX, 98 KB)](#)

- [Measuring success tool (PDF, 379 KB](#)

Considerations for measuring performance

Principles	Performance outcomes	Examples of types of measures
Engagement is genuine	People had faith and confidence in the engagement process	• Was there opportunity for different knowledge and perspectives to be shared? • How well did the engagement process enable stakeholder and community issues and solutions to be identified? • How did people interact with each other? • Did the process build community capacity about planning? • Would people participate in a similar process in the future?
Engagement is inclusive and respectful	Affected and interested people had the opportunity to participate and be heard.	• Did everyone who is impacted and/or interested have an opportunity to participate? Was there an opportunity for different knowledge and perspectives to be shared?
Engagement is fit-for-purpose	People were effectively engaged and satisfied with the process. People were clear about how the proposed changes and how may affect them.	• Did people feel the process enabled appropriate input? Did people understand how to participate in the engagement? Did people understand what was being proposed?
Engagement is informed and transparent	All relevant information was made available, and people could access it easily. People understood how their views were considered, the reasons for the outcomes and final decision.	• Did people have access to the information they needed? How was participant input considered in the final decision? How did it add value? Does reporting adequately capture the spectrum of participant views?
Engagement is review and improved	The engagement was reviewed and improvements recommended	• Were learnings about the process documented?

2.4   Prepare your engagement plan

Prepare an engagement plan for your project which includes the information gathered as part of Steps 1 and 2.

How well your engagement plan addresses the principles will be a major consideration of the Minister and the State Planning Commission in approving your engagement plan.

Why this is important

The engagement plan is a document that sets out the steps for engagement.

A requirement of Practice Direction 2 - Consultation on the Preparation or Amendment of a Designated Instrument is that an entity preparing or amending a designated instrument must prepare an engagement plan.

The engagement plan must be submitted to the State Planning Commission for approval.

The State Planning Commission will check that the proposed engagement meets the principles of the Charter. The intent to meet the principles of the Charter is demonstrated through completing the Steps 1 and 2 in this Toolkit.

How to do it

Prepare your engagement plan using the information gathered through Steps 1 and 2.

While a template is provided with this Toolkit, the Charter does not prescribe a particular template for the plan. You may use your organisation's engagement plan template, another template or the Better Together template available from the Better Together website along with other proven engagement tools.

The most important thing for your engagement plan to capture is the information outlined in the steps of this Toolkit.

Tools

- Engagement plan template (DOCX, 98 KB)

Example

- State Planning Policy engagement plan (PDF, 319 KB)

2.5   Get approval from the State Planning Commission, if required

Submit your engagement plan to the State Planning Commission for approval, if required

Why this is important

Before you start engagement on a State Planning Policy, Region Plan or Infrastructure Scheme you must submit your engagement plan to the State Planning Commission (the Commission) for approval.

Before it goes to the Commission, staff from the department will assess your engagement plan and may seek amendments or clarifications before forwarding it on to the Commission with advice.

How to do it

It is recommended that the engagement plan be submitted to the State Planning Commission with initiation documentation.

It is recognised that there may not be enough information to determine the details of the engagement plan at this early stage, in which case the engagement plan can be lodged after the initiation.

Step 3 - commence engagement

Step checklist:

1.   Implement the engagement plan

2.   Actively review and amend the engagement plan

3.   Close the loop on the engagement

4.   Collect evaluation data

3.1   Implement the engagement plan

Why this is important

You must run your engagement to meet the requirements of the Community Engagement Charter.

How to do it

Deliver the engagement activities in your engagement plan. A number of tools are available to get the most out of your engagement activities.

Tools

*   Engagement checklist (PDF, 258 KB)

*   Engagement techniques (PDF, 1818 KB)

*   Workshops tool (PDF, 294 KB)

*   Community Open House tool (PDF, 284 KB)

*   Survey guide (PDF, 262 KB)

*   3D modelling (PDF, 656 KB)

Example

*   State Planning Policy survey (PDF, 276 KB)

3.2   Actively review and amend the engagement plan

Why this is important:

Part of listening to the community is getting feedback on the engagement approach. If that feedback suggests that the engagement is not adequate, then think about varying the plan.

As the engagement gets underway, you may need to review and amend your plan if:

- new issues or ideas emerge
- you learn more about your communities
- your resourcing needs change.

How to do it

This may mean rethinking the activities you have planned and altering the timing of the engagement or and the kind of stakeholders you target.

As you review your actions, consider the resourcing requirements and adjust your plan as required.

Be flexible. Actively review and change direction if you need to throughout the engagement. All engagement plans will change in some way at various points in the engagement process.

You do not need to get the Commission's approval to vary the engagement plan.

An explanation of any changes to the engagement plan and any additional engagement can be provided in the engagement report you submit at the end of the process.

3.3   Close the loop on the engagement

Closing the loop is an ongoing process and happens throughout the engagement process at the conclusion of each activity or stage.

It's not something that only occurs at the end, when you submit your planning policy, strategy or scheme to the Minister for Planning and State Planning Commission for approval.

Issues around engagement should be addressed as they arise and not left until the engagement process has concluded.

Why this is important

As you complete the stages of the engagement, close the loop with participants by providing them with information about how their feedback will be used. Participants could be workshop or forum attendees, local residents, or the broader community.

An important direction of the Charter is to ensure that participants involved in engagement are shown that their input was heard and that they understand if it has impacted the proposal or not.

Doing so shows participants that their involvement was valued and meaningful, and that the engagement and policy process is open, transparent and accountable.

How to do it

The Charter does not have a set format to close the loop on engagement activities. You could:

- summarise the diversity of feedback received

- outline how the information has been, or will be, used

Remember to communicate with stakeholders in a way that is clear and accessible

Ways to close the loop include:

- preparing an engagement report and providing it to participants and the wider public at the end of each stage of engagement

- providing closing statements at the end of workshops, reiterating the kind of feedback received and saying how this information will be used

- sharing the results of the engagement online, in brochures or other published means

- conducting information events or presentations to groups on how the engagement results have influenced the proposal.

- undertaking follow-up engagement activities to clarify and resolve any critical outstanding matters.

Tools

- Engagement summary report template (DOCX, 91 KB)

- Closing the loop (PDF, 298 KB)

Example

- What We Have Heard Report on the car parking review (PDF, 724 KB)

3.4   Collect evaluation data

Gather the information required to measure the success of your engagement

Why this is important

During the engagement, make sure you are gathering the required the information to support your evaluation and the measures of success identified in Step 2. You will need this information to complete your engagement report in Step 4, which is submitted to the Minister.

If multiple people are running different engagement activities, they must be aware of the data collection requirements.

How to do it

Your project team needs the right tools to gather the required information for your evaluation.

- feedback forms

- attendance sheets to collect numbers and details of participants at events or names of organisations

- web analytic tools

Collect feedback and evaluation data from stakeholders throughout engagement activities to address the Commission's minimum evaluation criteria.

A survey template is provided that can be used for collecting responses to the minimum evaluation criteria.

Tools

- [Template and Guide - Measuring success (PDF, 379 KB)](#)

- [Template - Community evaluation survey (DOCX, 101 KB)](#)

Example

- [The Draft State Planning Policies survey (PDF, 276 KB)](#) is an example of setting questions for feedback on a project and using the minimum performance indicators to evaluate the success of engagement.

Step 4 – report on the engagement

Step checklist:

1. Close the loop with participants

2. Measure the success of the engagement

3. Prepare the engagement report

4.1   Close the loop with participants

Close the loop with participants and communities regarding the decision outcome and how input has been used to inform the final planning policy, strategy or scheme.

Why this is important:

An important direction of the Charter is ensuring that people know how their feedback was used to influence a planning outcome.

If your project involved a multi-stage engagement, you will have already closed the loop with your stakeholders at the end of each engagement activity and stage.

Once the proposal for the planning instrument has been completed, you need to close the loop with your stakeholders again regarding the feedback that was received and how it has been used to inform the proposal.

How to do it

Refer to the Closing the loop in Step 3.

It is a legislative requirement that the engagement report is published on the SA planning portal.

In accordance with Practice Direction 2, an engagement report will be published within five days of the final decision being handed down by the Minister.

The engagement report provides stakeholders with a summary of the engagement process, including what was heard and how input into the engagement has been considered.

Tools

- Closing the loop tool (PDF, 298 KB)

4.2 Measure the success of engagement

Determine the level to which the measures of success (including the minimum evaluation criteria) have been achieved and cross-check the delivery of your engagement against the Charter principles.

Why this is important

At the end of the project, you must determine how successful the engagement has been. Understanding what went well in your engagement and what could have gone better will help inform future engagements.

The information gathered as part of this step will also form part of your engagement report to the Minister and the State Planning Commission.

How to do it

Using the information collected, analyse how well your measures of success were achieved and how well the principles of the Charter were addressed.

Tools

- Measuring success tool (PDF, 379 KB)

4.3 Prepare the engagement report

Prepare your engagement report and submit this with the proposed planning amendment to the Minister to facilitate a final decision.

Why this is important:

Under Practice Direction 2, you must submit an engagement report to the Minister along with the final proposed or amended planning policy, strategy or scheme.

If the Minister considers that the Charter requirements have not been sufficiently met, they may seek advice from the State Planning Commission.

How to do it

Using the engagement report template will ensure that the requirements of the Practice Direction are met.

The engagement report should outline the engagement conducted, the feedback received and how that feedback was used, or not to shape the final proposed policy or instrument.

When drafting the report, the level of information and detail provided can reflect the size, scale and complexity of the subject proposal. For example a relatively small scale, privately led spot rezoning

Code Amendment (see example) will inevitably require a different approach and level of detail compared to level of detail in a statewide Commission led review of the Code (see example).

It is also appropriate that for consultations where significant numbers of submissions were received, to use methods to effectively summarise information (such as breaking up commonly raised issues from submissions into 'themes') and then providing responses to these themes accordingly. This will enable the appropriate legislated requirements and detail to be captured in the report while also keeping the report appropriately concise and legible.

The engagement report must also include an evaluation of the effectiveness of the engagement that considers whether:

- the measures of success have been achieved

- the principles of the Charter have been met

- all mandatory requirements have been met

The engagement report will be published on the SA planning portal five days after the final decision by Minister on the proposed policy or instrument.

The exception to this rule applies to new or amended State Planning Policies, where the engagement report is published five days after the Governor's final decision.

Tools

- Engagement report template (DOCX, 98 KB)

Step 5 – reflect and learn

Identify what worked well and what could be improved.

Conduct lessons learned exercise with your project team and share your engagement journey with your peers or industry.

Why this is important

Identifying areas for improvement and what worked well can result in more effective engagement in the future. It can help to better utilise time and resources in future engagements and manage risk more successfully.

How to do it

As a project team, reflect on how well the engagement went. Record and share your learnings to improve future engagement processes, participation, skills and outcomes.

Key questions to ask include:

- What went well?

- What was challenging?

- What would you change if the same or similar situation presented itself again in the future?

- Was there anything you could have done better?

- Were the measures useful in understanding the success of the engagement?

- How can your learnings be recorded and applied to your next engagement process?

It's also important to celebrate your successes and hard work!

Share your engagement journey with your colleagues and your industry to help improve their engagement skills.

Consider doing a presentation to staff or at an industry event or share your story in a publication or as a case study.

Tools

- [Lessons learned tool (PDF, 270 KB)](#)

Tools and templates

Throughout the amendment process, practitioners should use these tools and templates to assist each step of engagement.

Step 1 - Prepare to engage

- Stakeholder analysis (DOCX, 234 KB)

Step 2 - Plan your engagement

- Engagement plan template asset_summary_492173%
- Measuring success (DOCX, 214 KB)
- Planning instruments and examples of level of engagement (PDF, 229 KB)
- Charter principles in action (PDF, 442 KB)
- Types of activities for different levels of engagement (PDF, 114 KB)

Step 3 - Commence engagement

- Checklist for events (PDF, 258 KB)
- Engagement techniques (PDF, 1818 KB)
- Types of engagement - Workshops (PDF, 294 KB)
- Types of engagement - Open House (PDF, 284 KB)
- Types of engagement - Surveys (PDF, 262 KB)
- Types of engagement - 3D models (PDF, 656 KB)
- Community evaluation survey (DOCX, 101 KB)

Step 4 - Report on the engagement

- Engagement summary report (DOCX, 91 KB)
- Engagement report (DOCX, 98 KB)
- Closing the loop (PDF, 298 KB)
- Lessons learned (PDF, 270 KB)

Step 5 - Reflect and learn

- Lessons learned tool (PDF, 270 KB)

Case studies

Practitioners can use these case studies to understand methods of engagement that may be appropriate for their project.

State Planning Policies example

- Engagement plan for State Planning Policies (PDF, 319 KB)

- Survey used for State Planning Policies (PDF, 276 KB)

- What We Have Heard Report on State Planning Policies (PDF, 3329 KB)

- State Planning Policies Engagement Report (PDF, 1101 KB)

Case studies:

Case study and author	Designated instrument applicable to
Food Bowl DPA (PDF, 289 KB) *Adelaide Plains Council*	• Planning and Design Code • Design Standards • Infrastructure Schemes
Mid Murray Open Space Plan (PDF, 698 KB) *Mid Murray Council*	• Regional Plans • Planning and Design Code
Mount Barker Town Centre DPA (PDF, 2106 KB) *Mount Barker Council*	• Regional Plans • State Planning Policies • Planning and Design Code
Parramatta Road Corridor (PDF, 293 KB) *Urban Growth NSW*	• Regional Plans • Planning and Design Code
City Planning Strategy (PDF, 875 KB) *City of Perth*	• Regional Plans • Planning and Design Code
Redevelopment of the former Royal Adelaide Site (PDF, 860 KB) *Renewal SA*	• Regional Plans • Planning and Design Code

PART B – COMPLYING CHANGES TO THE PLANNING AND DESIGN CODE

Consultation on a complying change - section 75 of the Act

Section 75 of the Act relates to the ability to undertake a much quicker and more streamlined 'complying change' to the Code where it is consistent with a specific recommendation in a Regional Plan. A complying change may comprise a change to:

- the boundary of a zone or subzone; or
- the application of an overlay.

A complying change can be initiated or agreed to by the Minister, after seeking the advice of the Commission. However, under section 75(2), a complying change must still be the subject of consultation under the Charter.

Accordingly, a new section was introduced into the Charter in late 2024 (Part B), to set out the specific consultation requirements.

Practice Direction 2 – Preparation and Amendment of Designated Instruments was also updated in late 2024 to outline the entire process for a complying change proposal in order for a proposal to be considered by the Minister for Planning.

The proponent must undertake consultation in accordance with the following mandatory requirements set out in Part B of the Charter.

It is important to note that no other provisions of the Charter apply to a complying change. This is because the local community would have already been consulted and given the opportunity to influence the proposed changes during the engagement process for the regional plan itself.

Following this, it's also important to note that:

- there is a two-year time limit to lodge a proposed complying change based on a regional plan recommendation
- recommendations within a regional plan must be appropriately specific and detailed during consultation if they are to then lead to a complying change.

For a regional plan recommendation to qualify for a complying change, it must clearly and expressly outline the details of the proposed changes to the area (subject to the satisfaction of the State Planning Commission and Minister for Planning).

This should typically include proposed changes (where relevant) to the:

- zone
- subzone
- overlay/s
- concept plan

- the following technical and numeric variations or other detail that reasonably describes the envisaged urban form to be applied to the affected area including density and/or building heights:
    a. maximum building heights
    b. minimum site areas

Complying Change - Mandatory Consultation Requirements

1. On or before the commencement of consultation, the entity must directly notify the relevant council/s (and, if relevant, the joint planning board/s) in which the affected land is located advising that a Complying Change proposal has been lodged with the Department of the Minister and will be the subject of the following notice.

2. The Department of the Minister will place a notice on the SA Planning Portal for a period of 10 business days, which:

    a. identifies the affected area impacted by the proposal;

    b. explains the proposal;

    c. identifies which recommendation in the relevant Regional Plan the proposal is consistent with;

    d. indicates the location on the SA Planning Portal where the relevant Regional Plan can be viewed;

    e. specifies that a person may make a written representation on the proposal during the 10 business day period;

    f. advises that a written representation:

        i. is limited to commenting on the proposal; and

        ii. cannot affect the relevant recommendation in the Regional Plan as it is within an approved and operational designated instrument; and

    g. the method/s in which a person may make a written representation (i.e. by email, post, telephone).

For more information visit
plan.sa.gov.au