# Designated entity

# *Designated instrument* *name*Engagement plan

Date

## Contact details

Name:

Position:

Email:

Phone:

## Background information

Compile and summarise background information regarding the preparation or amendment of the planning instrument by considering the following key questions.

* Why is this project being initiated?
* What does it hope to achieve?
* Are there any existing reports, plans or strategies relating to the subject area? If so, what do they say?
* What have any past engagement processes identified about the subject area/issue?

## Engagement purpose

*Develop a clear statement that describes the purpose of the engagement (refer pages 12 and 15 of the Guide to the Community Engagement Charter for more information and examples).*

The purpose of the engagement is to:

* XYZ
* XYZ

## Engagement objectives

*‘Unpack’ your engagement purpose statement and describe your engagement objectives (refer pages 12 and 15 of the Guide to the Community Engagement Charter for more information and examples).*

The engagement objectives are to:

* XYZ
* XYZ

## Scope of influence

*Describe those aspects of your project which are negotiable and non-negotiable. This will help you to understand the scope of influence for stakeholders and the community, which in turn will inform the types of engagement activities you undertake (refer pages 13 and 16 of the Guide to the Community Engagement Charter for more information and examples).*

Aspects of the project which stakeholders and the community *can* influence are:

* XYZ
* XYZ

Aspects of the project which stakeholders and the community *cannot* influence are:

* XYZ
* XYZ

## Key messages

*Using the engagement purpose, objectives and scope of influence as a basis, develop agreed key messages about your project that will form the basis for all communications materials and discussions during the engagement.*

The following key messages will underpin the engagement regarding the [insert title of project]:

* XYZ
* XYZ

## Stakeholder and community mapping

*Undertake an analysis of stakeholders and the community and determine their level of engagement in the project (refer pages 13-14 and page 16 of the Guide to the Community Engagement Charter for more information and examples).*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Stakeholder**  | **Level of interest in the project** (i.e. high, medium or low) | **Nature of interest in the project and/or the potential impact of the project** | **Stakeholder needs/expectations for engagement in the project**   | **Level of engagement** (i.e. inform, consult, involve, collaborate) |
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## Applying the Charter principles

*Through the lens of the Charter principles, consider how the characteristics of your stakeholders and community will need to be considered in the design of your engagement (refer pages 15 and 17 of the Guide to the Community Engagement Charter for more information and examples).*

*Note that how you respond to these needs will help you to put the Charter principles into practice and may comprise measures for evaluating your engagement.*

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| **Stakeholder**  | **Engagement need or technique**  |
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## Staging your engagement

*‘Map out’ the key stages of your engagement. This is a high level summary which will be more fully described in a following section (refer pages 18 and 23 of the Guide to the Community Engagement Charter for more information and examples).*

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| --- | --- | --- | --- | --- |
| **Stage**  | **Objective**  | **Stakeholders**  | **Level of engagement**  | **By when** |
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## Planning your engagement approach

*Identify the engagement activities you will use for each stage of the project, as well as timing, resourcing and other considerations (refer pages 18 and 24 of the Guide to the Community Engagement Charter for more information and examples).*

*Note that once your engagement process has been described in more detail, you will need to consider your organisation’s capacity to deliver. This may result in amendments to your proposed activities, or consideration of other resources that may need to be acquired.*

| **Stage** | **Engagement activity**  | **Engagement level and objective of activity**  | **Stakeholders/ target audience**  | **Timing**  | **Who’s responsible? \*** | **Resources required \*** | **Budget \*** | **Risks and mitigation \*** |
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 **\***this information does not need to be provided to the Minister

## Applying the Charter principles in practice

*Consider how the engagement activities you have identified address each of the Charter principles (refer pages 22 and 27 of the Guide to the Community Engagement Charter for more information and examples).*

| **Charter principle** | **How does your engagement approach/activities reflect this principle in action?**  |
| --- | --- |
| Engagement is genuine  |  |
| Engagement is inclusive and respectful  |  |
| Engagement is fit for purpose  |  |
| Engagement is informed and transparent  |  |
| Engagement is reviewed and improved  |  |

## Measuring success

At the completion of the engagement, all participants will be invited to assess the success of the engagement against performance criteria one to four, below. The project manager, with assistance from communications and engagement specialists, will assess the success of the engagement against criteria five to nine. This evaluation will be included in the statutory report (section 73(7) of PDI Act) that is sent to the State Planning Commission and the Minister for Planning and which details all engagement activities undertaken. It will also be referenced in the Commission Report (section 74 (3)(b) that is issued to the Governor of South Australia and the Environment Resources and Development Committee of Parliament. Any issues raised about the engagement during the engagement process will be considered and action will be taken if considered appropriate.

| **#** | **Charter criteria** | **Charter performance outcomes** | **Respondent**  | **Indicator 2** | **Evaluation tool 3****Exit survey / follow-up survey** | **Measuring success of project engagement** |
| --- | --- | --- | --- | --- | --- | --- |
| 1 | Principle 1:Engagement is genuine | * People had faith and confidence in the engagement process.
 | Community  | I feel the engagement **genuinely sought** my input to help shape the proposal | Likert scale - strongly disagree to strongly agree | Per cent from each response. |
| 2 | Principle 2:Engagement is inclusive and respectful | * Affected and interested people had the opportunity to participate and be heard.
 | Community | I am **confident my views were heard** during the engagement | Likert scale - strongly disagree to strongly agree | Per cent from each response. |
| Project Lead | The **engagement reached** those identified as community of interest. | * Representatives from most community groups participated in the engagement
* Representatives from some community groups participated in the engagement
* There was little representation of the community groups in engagement.
 | Per cent from each response. |
| 3 | Principle 3:Engagement is fit for purpose | * People were effectively engaged and satisfied with the process.
* People were clear about the proposed change and how it would affect them.
 | Community | I was given sufficient **information** so that I could take an informed view. | Likert scale - strongly disagree to strongly agree | Per cent from each response. |
| I was given an **adequate** **opportunity to be heard**  | Likert scale - strongly disagree to strongly agree | Per cent from each response. |
| 4 | Principle 4:Engagement is informed and transparent | * All relevant information was made available and people could access it.
* People understood how their views were considered, the reasons for the outcomes and the final decision that was made.
 | Community | I felt **informed** about why I was being asked for my view, and the way it would be considered.  | Likert scale - strongly disagree to strongly agree | Per cent from each response. |
| 5 | Principle 5:Engagement processes are reviewed and improved | * The engagement was reviewed and improvements recommended.
 | Project Lead | **Engagement was reviewed** throughout the process and improvements put in place, or recommended for future engagement | * Reviewed and recommendations made
* Reviewed but no system for making recommendations
* Not reviewed
 | Per cent from each response. |
| 6 | Engagement occurs early  | * Engagement occurred before or during the drafting of the planning policy, strategy or scheme when there was an opportunity for influence.
 | Project Lead | Engagement **occurred early enough** for feedback to genuinely influence the planning policy, strategy or scheme | * Engaged when there was opportunity for input into scoping
* Engaged when there was opportunity for input into first draft
* Engaged when there was opportunity for minor edits to final draft
* Engaged when there was no real opportunity for input to be considered
 | Per cent from each response. |
| 7 | Engagement feedback was considered in the development of planning policy, strategy or scheme | * Engagement contributed to the substance of a plan or resulted in changes to a draft.
 | Project Lead | Engagement **contributed to the substance of the final plan**  | * In a significant way
* In a moderate way
* In a minor way
* Not at all
 | Per cent from each response. |
| 8 | Engagement includes ‘closing the loop’  | * Engagement included activities that ‘closed the loop’ by providing feedback to participants/ community about outcomes of engagement
 | Project Lead | Engagement **provided feedback to community about outcomes** of engagement | * Formally (report or public forum)
* Informally (closing summaries)
* No feedback provided
 | Per cent from each response. |
| 9 | Charter is valued and useful | * Engagement is facilitated and valued by planners
 | Project Lead | Identify **key strength** of the Charter and GuideIdentify **key challenge** of the charter and Guide  |  |  |

*OPTIONAL*

*Identify any additional measures of success for your engagement that can help you evaluate how your engagement process as a whole has reflected the Charter principles in practice.*

| **Charter Principle** | **What additional measure/s can help evaluate this principle?**  | **What additional method will we use to collect information about this measure?** | **How do we integrate collection of this information with our planned engagement activities?**  |
| --- | --- | --- | --- |
| Engagement is genuine  |  |  |  |
| Engagement is inclusive and respectful  |  |  |  |
| Engagement is fit for purpose  |  |  |  |
| Engagement is informed and transparent  |  |  |  |
| Engagement is reviewed and improved  |  |  |  |

## Closing the loop and reporting back

*Identify how you will close the loop and report back as you progress through each stage of your engagement (refer page 19 of the Guide to the Community Engagement Charter and the ‘closing the loop’ tool for more information).*

| **How will you respond to participants?**  | **Who’s responsible?** | **When will you report back?** |
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