

Tool 2.1: Checklist for developing an engagement plan

☐ **Engagement purpose:** Have you clearly defined the purpose of the engagement?

This involves explaining the reason input or participation is necessary, i.e. what planning problem is the community helping to resolve or what decision does local government need to make? This process also involves defining the stakeholders affected and the decision-makers.

☐ **Engagement scope:** Have you clearly defined the scope of the engagement project?

This involves explaining the decisions that need to be made, what the engagement process will focus on, and what you are seeking input on. This process also involves defining what is non-negotiable (i.e. what the community cannot influence) and what is negotiable (i.e. what the community can influence). At this point you could also reach out to internal engagement staff to confirm your approach, and determine if external engagement resources are required.

☐ **Engagement objectives:** Have you clearly defined the objectives that the engagement process will achieve?

This involves explaining the objectives of your engagement process. Engagement objectives could relate to a range of potential outcomes, including:

- ☐ building community capacity to understand planning and development issues
- ☐ building stronger relationships with community and stakeholders
- ☐ seeking innovative solutions for planning and development challenges
- ☐ making better decisions about planning and development.

☐ **Context analysis:** Have you conducted analysis to understand the local, regional, state and national context that will affect the engagement process?

This could involve exploring local demographic and economic characteristics, access to technology, level of understanding of planning issues, response to previous engagement processes.

☐ **Stakeholder and issues analysis:** Have you conducted analysis of the different stakeholders and community groups that could be interested in your process?

This analysis could include identifying stakeholders and community groups, exploring what issues are of interest to them and how these individuals and groups might be affected, and what methods you will use to engage and build relationships with them.

☐ **Level of engagement:** Have you determined the role of the community in the decision-making process?

This process involves determining whether you will be promising to inform, consult, involve, collaborate or empower the community. This could also include identifying the phases of a project or process where the particular levels of engagement will apply.

☐ **Engagement phases:** Have you described the project phases and timeframes?

This involves describing the phases of your project, and the associated timeframes, and how the engagement process supports these phases and complements the overall delivery of the project.

☐ **Data collection and analysis:** Have you determined what data are required to support the decision?

This process involves identifying how community input will be collected and in what format, and how it will be used to inform the decision.

- ☐ **Engagement methods:** Have you defined a list of methods or tools you will use to inform community members, and gain community input, feedback or collaboration to achieve your engagement objectives?

This will include communication methods to raise awareness or understanding about the planning or development project, and how feedback will be provided to the community about the engagement process, what has been heard and how it will be considered.

- ☐ **Resources:** Determine what financial and human resources are needed, or are available, to deliver the defined engagement methods.
- ☐ **Implementation plan:** Define a schedule for how and when the engagement will occur, which should be linked to the engagement phases of the project.
- ☐ **Feedback:** Identify how feedback will be provided to community members and stakeholders so that they understand how their input shaped the project or process outcome.
- ☐ **Evaluation measures:** Define what you will do to evaluate the success of your engagement. This could include ways to measure how satisfied the community and the project team are with the engagement process, the quality of the input received, and how well the engagement program achieved your stated objectives.