



**Engagementworks**

# **Community Engagement Basics**

**Session 9 – Video 1**

**Building an Engagement Plan -  
Overview**

# Building an Engagement Plan - Overview

## Introduction

In this session we focus on building and implement an engagement plan.

In this introductory lesson we –

- look at what's in an engagement plan
- Introduce templates as an aid to building a plan
- Explain how the templates inter-connect
- Explain how templates can help make writing an engagement plan easier



We also acknowledge that these templates are only one way of approaching plan development. You may have other ways of creating your engagement plans.

However, what this approach does is to give some consistency in the way in which engagement plans are prepared and ensures that nothing is left out.

The templates can also be adapted to suit the significance of the project and nature of the proposed engagement process.

## What's in an Engagement Plan

To begin let's look at what you would find in an engagement plan.

Here's a contents page –

Project description and background

- Project engagement objectives
- Timeframe and completion date
- Communities to be engaged with
- Engagement tools and techniques to be used
- Resources needed to complete the engagement
- Tools to assist decision-making
- Communication planning
- Basis of assessment and feedback to the communities involved
- Governance and project team
- Appendices (if any)



## What are our key templates?

We have developed a set of templates that you can use to help you create your engagement plan.

These templates help you –

- Define project objectives
- Identify & define key citizens and stakeholders
- Connect citizens & stakeholders to your project
- Identify who needs to be on your team
- Shape your timeline, tasks and tools



The templates don't necessarily flow from one to the next. You will find, as you fill them in, that you will duck and dive from one to another.

This is because they are all interrelated and are designed to stimulate the thought processes that will lead to the creation of a project engagement plan.

In the remainder of this lesson we introduce the templates which we go into in detail in succeeding lessons.

## Engagement Plan Template

Here you can see a template for an entire engagement plan. The data in this plan comes from the other supporting templates which we will introduce shortly.

The key to this template is the section headings. These ensure that nothing gets missed. The way the data is presented under each heading can vary from plan to plan.

It will depend a lot on the particular project or decision in each case and the associated community of interest.

As we go through the templates in later lessons we have used a council example of an engagement plan for adopting a significance and engagement policy which will give insights on use of the templates in a practical real life sense.

### Project name Engagement Plan

#### Project description and background

- Briefly describe the nature of the engagement to be undertaken, clarify the decision to be made, the circumstances that led to it, related council decisions already made, and legislation applying.

#### Engagement objectives

- What feedback or decisions are sought from communities?
- What decision will be made by council that is to be informed by community input?

#### Timeframe and completion date

- Describe the project stages and key decision points. Include the likely dates of decisions to be made by council.

Key project stages	Completion date

#### Communities to be engaged with

- List the key communities and stakeholders to be engaged.

#### Engagement tools and techniques to be used

- List the key communities and stakeholders to be engaged with and describe the tools and techniques that will be used to engage. Refer to the Engagement Spectrum to determine the engagement level desired.

Community group or stakeholder	How this group will be engaged

#### Resources needed to complete the engagement

- This schedule should include time allocations for council staff and councillors, and costs involved in delivering the selected tools and techniques. This should include costs of external service providers, special materials needed, data analysis, venue hire and so on.

#### Communication planning

- Outline any council reputation risks that may be associated with this project.
- Describe measures to be undertaken to mitigate those risks.
- Describe key messages to be publicly communicated.
- If necessary attach a separate communication plan.

#### Basis of assessment and feedback to the communities involved

- Having gathered and analysed community input, describe how this will be analysed and results communicated to council and to the participating communities. Indicate when this feedback will occur before or after council decisions are made.

#### Project team roles and responsibilities

- Outline who will be contributing to this project, including external service providers, and who has oversight of it within council.

Team member	Role and responsibilities
	Project sponsor
	Project leader



All of the templates used in these lessons are included as downloadable MS Word documents that you can adapt use in your own planning exercises.

## Template 1 - Clarifying and defining your overall project objectives

Here is the first template, Clarifying and defining your overall project objectives.

As you can see it contains a series of questions which we will go through in detail in the next lesson.

<b>Outline your project objectives</b>
<b>What are the overall goals for the project?</b>
<b>What are the major assumptions and requirements for the project (refer to your Evaluation Plan for your project if developed)?</b>
<b>What are the specific deliverables for your project?</b>
<b>What are the key responsibilities of the project and how do these relate to the Community Engagement Plan?</b>
<b>What decisions have already been made that will affect the development of the Community Engagement Planning process?</b>
<b>What aspects of this situation are negotiable or not negotiable? (e.g. legislation, policy, etc.)</b>



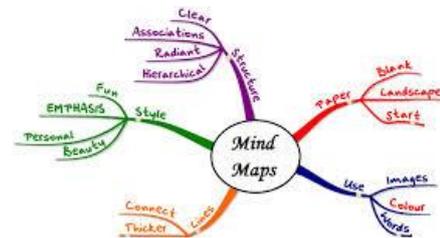
## Template 2 - Create a Mind Map

One way of beginning to identify who the affected stakeholders or community may be is a mind map.

Mind Mapping is a simple, practical tool for improving your creative-thinking, planning and problem-solving abilities. It will help you:

**Generate more ideas:** Mind Mapping allows you to start quickly and generate more ideas in less time. You don't have to edit or order your thoughts; just start with a creative doodle in the centre of your page and begin printing words on lines emanating from the centre as you think of them. The free-ranging format — adding words to one branch one moment, then skipping over to another branch the next — increases your chances of generating new ideas.

**Make new connections:** Mind Mapping allows you to represent a tremendous amount of information in a relatively small space. You can have all your notes for a topic on one piece of paper, with your ideas arranged in a way that encourages you to see relationships between them. Mind Mapping helps you see connections among things that may have seemed completely separate.



**Improve your memory:** Remembering your material becomes much easier. Colours, images and key words — three central ingredients of Mind Maps — are much more engaging to the brain than sentences. A well-made Mind Map is almost impossible to forget!

**Use your whole brain:** Half a mind is a terrible thing to waste. Mind Mapping helps you strengthen your analytical left brain by training you to look for the most essential key words. At the same time, it stimulates the right brain by encouraging you to use colours and images.

What you will end up with is a picture showing who you need to engage with and why.

**Describe the economic, environmental, social and cultural conditions of your project**

## Template 3 - Defining Citizens and Stakeholders

This template builds on the mind map. It provides a place for you to list out your stakeholders and their connection to your project

List citizens or stakeholders	What are their values and needs?
1.	
2.	
3.	
4.	
5.	
Etc.	

## Template 4 - Citizens and stakeholder relationship to the project

This template takes stakeholder analysis a step further. It enables you to document information about stakeholders' effect on the project and their interest and influence.

These templates place a lot of emphasis on full and accurate stakeholder identification which is crucial to a successful engagement.

1. Citizen and Stakeholder Groups (Translate this information from Template 3 to here and column 1 from Template 6 – Your Community Engagement Plan.	2. Needs at stake in relation to project	3. Effect on the final outcomes of the project	4. Importance of citizens and stakeholders for success of project currently	5. Degree of influence of stakeholder over project	
				U, 1, 2, 3, 4 or 5	U, 1, 2, 3, 4 or 5
		U, 1, 2, 3, 4 or 5	U, 1, 2, 3, 4 or 5	Current	Future
e.g. Project team	Project deliverables and milestones	+	5	4	5

**Legend:** U = unknown; 1 = little/no importance/influence; 2 = some importance/influence; 3 = moderate importance/influence; 4 = important/significant; 5 = critical

## Template 5 - Potential Community Engagement Project Team

It is important to include details of your project team in your engagement plan.

Team members can be both internal and external to the organisation.

The template sets a number of questions to step you through the process of setting up your project team.



<b>If you have an overall Project Team, who could potentially be involved in a specific Community Engagement Project Team?</b>
<b>If you don't have an overall Project Team, list people who you could consider for involvement in a specific Community Engagement Project Team?</b>
<b>Which citizen and stakeholder groups are included in the team?</b>
<b>List any additional stakeholders that could be included in a specific Community Engagement Project Team, or in the activities you are undertaking to ensure adequate inclusion?</b>

## Template 6 - Your Community Engagement Plan

The template for your engagement plan really brings things together. Much of the data comes from the other templates.

By this stage you should be in a position to write your engagement plan.

<b>Engagement Plan Title:</b>							
<b>Project Objectives:</b>							
1.							
2.							
3.							
4.							
5.							
1. List citizens and stakeholders	2. Which project objectives (1-5) relate to which citizen and stakeholders	3. Purpose of Engagement (Information, Consultation, Active Participation)	4. Suite of Tools	5. Resources (\$, FTEs, purchase expertise, people, skills, equipment)	6. Who is responsible (delegation) ?	7. When will it start and finish?	8. How and when will you report?

## Template 7 - Action Plan

As you have gone through and completed each template you will have identified actions that will need to be undertaken to either complete or implement the plan.

This template provides a place for you to summarise all of those actions and to allocate responsibility, time limits and resources.

Action	Who	When	Resources required

## Conclusion

In this lesson we have introduced the process to create and implement an engagement plan.

Along the way we have –

- Explained how templates can help make writing an engagement plan easier
- Looked at what's in an engagement plan
- Introduced templates as an aid to building a plan, and
- Explained how the templates inter-connect

In the next and succeeding lessons we focus on these templates and include some real data to demonstrate how they work.

