Your City Your Voice

engagement framework

R City of Ryde

ENGLISH

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ARABIC

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KOREAN

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TABLE OF CONTENTS

City of Ryde – Engagement Framework

Introduction

The City of Ryde is committed to engaging with residents, stakeholders and Council officers in the development of policy and plans and in the delivery of services to the community.

Involvement in the planning and delivery of services and policies has a number of benefits for the community, stakeholders and Council:

- It ensures that priorities are appropriate for current and future needs
- It provides valuable information and increases understanding for planning
- It value adds to projects and the outcomes they seek to achieve

Council has identified that engagement can occur in a number of ways and includes activities that may occur with external stakeholders and the community as well as with other Council officers and Councillors. Council also acknowledges that there will be times when engagement is not required.

It is important to remember that engagement requires contribution from all parties involved. We need others to be involved in activities in order for it to be effective. One of the challenges for Council is ensuring that engagement activities are targeted to both the project or issue as well as the target audience and stakeholders we are seeking to engage. No two projects are the same and so each process needs to be tailored in order to meet their differing needs.

About this Framework

In order to ensure a comprehensive, practical and effective approach, Council has developed the "*Your City, Your Voice*" model of engagement which includes a policy, this framework and a tool box to provide guidance on engagement at the City of Ryde.

The policy and framework provide Council officers and the community with the information and tools to ensure that engagement is undertaken fairly, is accessible to all and is effective. For any project at the City of Ryde all staff, consultants and contractors will be required to follow this framework. The Tool box is an internal document to provide support resources to support Council officers understanding and implementing engagement strategies.

The framework is divided into two parts.

- **Part One** contains concepts, levels and principles of engagement.
- **Part Two** takes you through the practical steps for planning your engagement strategies and evaluation.
- There is also a supportive **Tool box** that includes the practices that are known to work and the tools to support the delivery of effective engagement.

Not all the guidance offered is applicable to all types or scales of projects. You should design your engagement strategies in line with the needs of your respective projects but use the Engagement Matrix as your guide.

In developing the "*Your City, Your Voice*" model of engagement we acknowledge that there are many staff across the organisation that have experience in engagement. The framework and tools that have been developed are to ensure there is a consistent approach to engagement across the City of Ryde.

Commitments

A number of commitments have been developed and adopted by Council to reflect this promise to engage:

- We value input and feedback
- We want you to be involved
- We will provide a variety of activities to encourage you to be involved
- We will tell you what we have done with your contributions
- We will make it as convenient as we can
- Being involved is your choice
- Our engagement with you will be based on mutual respect.

To ensure these commitments are reflected in best practice engagement, City of Ryde has developed this Engagement Framework. The framework provides a practical approach to planning and implementing a professional and effective engagement process for all projects, plans and services.

The framework provides tools to assist Council officers in:

- Identifying what projects, issues, services, policies or plans need to have an engagement process
- Designing the process – the who, what, how, when and where
- Providing practical tools to design and implement an engagement process.

☐ ☐ ☐ ☐   *Officers should design their engagement plan in line with the needs of their respective projects.*

Tailor the process to fit your project

The Engagement Framework has been developed by Council officers from across the organisation. It recognises that for engagement to be effective, it needs to occur both externally – with residents, businesses, stakeholders and the community – and internally – with Council officers.

The framework is supported by an Engagement Toolbox which gives Council officers all the information they need in order to plan, implement and evaluate engagement strategies that is right for their project or issue.

Two important tools developed to support engagement processes is the Engagement Matrix and the Engagement Plan. They can be used on their own or in conjunction with other project management tools such as the Business Case and Project Management Plan, both of which identify potential project risks and mitigation measures. Engagement activities are often very effective project risk mitigation measures as well as effective communication activities.

Why is it good practice?

The Engagement Framework seeks to provide a target audience and stakeholders with certainty that Council will undertake engagement in a practical, accessible, respectful way that honours our commitments.

It also provides Council officers with the support they need in order to undertake their day to day work effectively.

Council is committed to working with the community, through listening to what people want to say and, where possible and appropriate, acting on information discovered through consultation.

The City of Ryde has a complex and changing population. Differing views and needs will need to be balanced and there will often be decisions that don't meet the needs of everyone.

The City of Ryde is a local government authority governed by the Local Government Act. This Act clearly highlights the important role Council plays in engaging the community. The community elect Councillors every four years to represent the community voice and make decisions for the benefit of Ryde now and into the future. The Engagement model aims to provide the Councillors with more detailed information on the needs and views of the community on Council projects and issues to assist in making informed decisions.

The City of Ryde has a complex and changing population. Differing views and needs will need to be balanced and there will often be decisions that cannot meet the needs of everyone.

Council believes that engagement required by legislation or regulations to represent the minimum level required. The City of Ryde is committed to engaging with the community in a meaningful way and through appropriate activities, and these may often exceed the minimum requirements of legislation or other requirements. The framework will help the project team in designing an appropriate strategy for every project.

Principles

Engagement is a central principle in sound planning and decision making. It is a process of better practice now formally undertaken by many Councils across Australia.

In order for engagement to be effective and consistent across an organisation, it is essential for the following principles to underpin the process.

Council is committed to and values the following principles of engagement:

1. A process which is consistent with Council's Values.
2. A transparent process, which requires a clear, consistent and open approach.
3. Engagement must be undertaken early in a project and in a timely manner to ensure the currency of the information when making decisions.
4. Recognise the input the community have made previously and develop strategies to utilise existing information.
5. Utilise the strengths of the community to enhance the engagement processes.
6. Develop inclusive, accessible and balanced engagement processes.
7. Monitoring, reviewing and continually improving the strategies and processes used to engage the community is essential.

Purpose

The Engagement Framework has been designed to answer the following questions:

1. How do I know if I need to engage?
2. Who should I be engaging with?
3. How do I design an appropriate process?
4. What do I need from the process so it improves my project?
5. How will I tell the people of Ryde what we have done with their contributions?

There are three key elements of the framework that must be either used as a reference or completed by staff when they are doing any form of engagement. These key elements ensure adherence to the Engagement Policy and the principles for engagement set down for the City of Ryde. They are the:

Engagement Matrix - must be used to decide which engagement strategies to use
Engagement Plan - must be completed and on record
Evaluation Form - must be completed and on record

Helpful hint:
A word on terminology
"Project" has been used to mean a project, issue, policy, plan or service – the subject of the engagement process.
"Stakeholder" is an individual or group which has a specific interest in one or more aspects or impacts of a project. It also includes 'target audience' while still recognising that 'target audience' is the catchment area for the engagement process – who needs to be aware so that they can choose whether or not to be involved.

Need Help?
Information is available through Council's Intranet site at 'Your City, Your Voice' which includes case studies, examples and contact details of staff who have varying degrees of experience in engagement and are happy to share their knowledge.

Levels of Engagement

Council has identified three specific levels of engagement:

| LOW | INFORM | CONSULT | COLLABORATE | HIGH |

INFORM	CONSULT	COLLABORATE
Telling people about an issue, project, service or plan	Providing people with information and asking them what they think	To partner with people to develop a project, plan or progress an issue and consider advice into decision making.
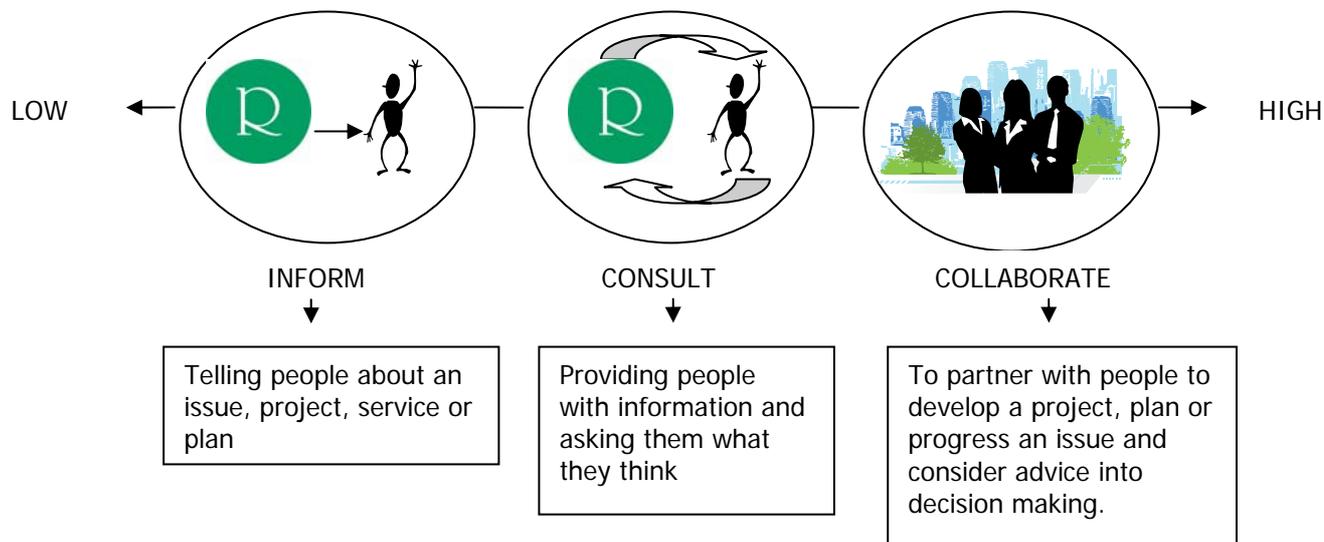
Engagement is a continuum – **all** engagement processes need to inform, most will have some level of consultation and some will include a collaboration – to ensure participation in the process.

Understanding which level of engagement is appropriate for a project is an essential first step.

Sometimes a decision has already been made, or an action is required, and so Council needs to make sure that those affected are aware – this would be at the **INFORM** level.

Other projects require some input, feedback, advice or ideas before parts of the project or decision can be progressed – this is at the **CONSULT** level.

At other times, Council needs to work with specific stakeholder groups or the community to work through a project and to provide guidance to Council to make the decisions – this engagement would be **COLLABORATE**.

These levels will help everyone – residents, stakeholders and Council officers – to understand how much they can influence the issue and what they can expect. In the majority of projects, there are differing views within the community on elements of projects. Council needs to consider all points of view and will provide feedback on the outcome of these considerations.

Many other models of engagement identify a level where the stakeholders/community make the decision. Due to the legislation and Council policies and procedures there would be very few opportunities at this stage for this type of level of engagement to occur. This Council is not ready for this level of engagement and will focus on informing and consulting in the first year of implementation to ensure the foundations are correct for further development of the engagement model at a later date.

Council engages a number of external resources to undertake and implement projects and studies. Part of the conditions of engagement for contractors/consultants state that they will be required to utilise the Engagement Framework as the basis for any engagement they are required to undertake.

Helpful hint:
Every project is different in regard to the target audience and stakeholders, level of impact and skill sets required. Every project needs to be planned individually, as issues and impacts may change during the project and the approach may need reviewing. The Framework and Toolbox should be used to ensure the necessary steps are followed and that the approach is appropriate and accessible to the target audience and stakeholders.

Stages in the Engagement Framework process

Successful projects share some common elements:

- They are planned effectively and appropriately
- Thorough research underpins the project plan
- The project team are well informed about the project, its objectives and intent
- Collaboration and effective communication within the project team

The framework is predicated on the project team implementing a sound approach to project management at all stages and undertaking the following steps:

STAGE 1 – Think About It

1. Identify Need for Engagement

2. Determine Negotiables and Non-Negotiables

3. Identify Level of Impact or Interest

STAGE 2 – Work It Out

4. Level of Engagement and Key Messages

5. Identify Stakeholders and Target Audience

6. Identify the Activities and Strategies

STAGE 3 – Do It and Review It

7. Engagement Plan and Feedback

8. Evaluation

Guide

Each step will tell you what you need templates and tools to use. You will be guided by the following icons:

Identifies the tool to use.

Indicates where you should record the information.

Helpful Hints or prompts for you to either remember or consider a set of questions when completing your information tools.

STAGE 1 – Think About It

Step 1 – Identify Need for Engagement

Aim - How do you make a decision to implement an engagement process?

Key Steps	Tools & Resources	Methodology & Template
☐ Identify if you need to engage ☐ Answer the questions under *Important Things to Remember*	☐ Answer the question: Do I need to engage?	N/A

The first step for every project is identifying if engagement is required. Council is committed to engaging with officers and the people of Ryde in the planning and delivery of services and projects. Across the organisation, there are hundreds of projects occurring at any one time. How do you make the decision to implement an engagement process?

Understanding what impact the project will have and identifying the potential level of interest that the project may generate will allow you to identify whether you need to engage and will assist in identifying when you can engage. Most engagement should occur as early as possible in a project.

To determine whether you will need to engage; consider the following:

1. It's the law
Engagement is required by legislation, such as the NSW Environmental Planning and Assessment Act (EP&A Act).

2. Council procedure
The project brief from Council's project management system will step you through the elements of the project. As you identify risks, stakeholders and deliverables, you may be able to clearly identify whether engagement is needed.

3. Has the community already been engaged on this project, issue, policy, plan or service?
If the answer no, you need to engage. If the answer is yes, are there any gaps in the information you currently have? If so, then yes you may require further engagement.

4. Possible Impact/Interest
If you believe the project will have adverse impact on the community or you believe it will generate a lot of interest in the community, you generally should undertake engagement.

5. Good/Better Practice
If undertaken as a process within a project, not as an after thought, engagement provides real value to the community, organisation and the project.

Good practice involves taking steps to increase transparency and accountability as a means of promoting understanding about your project and engendering public trust

Reminder:
If you have engaged a consultant or contractor to deliver your project they must follow the engagement framework, in particular the matrix. Consultant and Contractor terms and conditions have a clause that indicates they are required for follow the City of Ryde Engagement Framework.

Helpful hint:
Engage with the community as early as possible. This will assist in reducing the possible risks to the project that will come at a later stage.

Step 2 – Determine Negotiables and Non-Negotiables

Aim - What aspects of the project can be influenced by the engagement process?

Key Steps	Tools & Resources	Methodology & Template
☐ Scope out what can be influenced or changed as a result of feedback and ideas and what things cannot be changed	☐ Negotiables Guide	T1
	☐ Negotiables and Non-Negotiables Record	T2
☐ Record what is negotiable and non-negotiable		

Perhaps the most significant element of the project is understanding what aspects of the project can be influenced by the engagement process.

We call this identifying the "negotiables" and "non negotiables" of the project.

"*Negotiables*" are those aspects of the project that can be influenced, or changed as a result of feedback and ideas from the engagement process.

"*Non-negotiables*" are those things that cannot be changed.

For example there may be legal requirements that will make some aspects of a project non-negotiable. Council will endeavour to minimise non-negotiable elements of projects so that community engagement is meaningful. Engagement with the community should take place early in the life of a project in order to maximise negotiable elements.

Understanding what aspects of the project can be influenced and those that cannot is an essential element of the process. It provides the basis for clarity about the project for all communications, both internal and external to the project team.

By understanding this, you can also determine what level of engagement is needed.

Negotiables and non negotiables can change over time due to political changes, funding or as a result of input from the community.

Helpful hint:
You will also be able to identify what information you need to provide and how you invite comment or feedback. This provides the clear parameters for the engagement so there are no 'surprises' for participants and the information received is useful for the project.

How do you identify the Negotiables/Non-Negotiables?

T1 – Negotiables Guide
The Negotiables Scoping Questionnaire will help the project team to work through identifying the negotiables and non negotiables for consultation on the project.

Use the Negotiables Scoping Questionnaire to firstly scope the project and then to record the negotiables and non negotiables. Alternatively you can use a whiteboard to scope the project.

You do need to record your negotiables/non-negotiables in the Engagement Plan.

Questions to consider when identifying your projects negotiables and non-negotiables:

Has the decision to proceed with the project been made?
Is its location decided?
Are the physical size and area of the project determined?
Is the height of any building negotiable?
Is the cost of the service predetermined?
On the site, is the actual position of the project determined?
Are elements of the policy determined by others?
Identify the elements that the project must have in order to be successful. Can any of these be influenced? How?
Is the timing of development, implementation or construction decided?

Tool 2: Negotiables/Non-Negotiable Record

Keeping a record of what is negotiable or not is essential for a number of reasons:

- Project team members can change over time. This record provides clarity about the project and engagement activities, in one place.

- Changes can occur to projects over time. Keeping a record allows everyone to know what has been committed to and why and when changes occur, to record these as well so the project history is clear and unambiguous.

- The negotiables record can form the basis of key messages and other communication material for the project, providing clear information and ensuring consistency throughout.

Consistency in communication is one of the most important elements of effective communication, particularly for public communications. The negotiables record allows all members of the project team to share an understanding about the project and a level of detail that is often not well or clearly articulated.

> **TOOLS: Tool 1: Negotiables Guide**
> **Tool 2: Negotiables/Non-Negotiables Record**

Step 3 – Identify Level of Impact or Interest

Aim - Identifying which issues/impacts appear to be most important to the success of this project and long term sustainability

Key Steps	Tools & Resources	Methodology & Template
☐ Identify level of impact the project will have, together with the level of interest it is likely to generate ☐ Draw on learnings from other organisations on managing risk when engaging ☐ Research the history of the project, review other similar projects or issues in the past ☐ Check current media coverage and identify if there is any existing political interest in the project	☐ Level of Impact/Interest Criteria	T3

Identify Level of Impact or Interest

Now that you have an understanding of how the project can be influenced by engagement, you need to identify the level of impact it will have, together with the level of interest it is likely to generate.

These will help in identifying appropriate activities for both your project and participants.

Every project is different and you will need to work with the project team on determining the appropriate level of impact/interest. This is essentially a *risk management approach* – you are anticipating what may happen in the future. You don't need to consider only the worse case scenario, but you do need to consider the likelihood of a worst case scenario occurring.

Before you plan an engagement process you need to know who to engage with and how to present information to them.

The simplest way to do this is to:

- Understand the level of interest the project is likely to generate
- Understand what the issues are within the community that could relate to your project
- Identify the area that the issue is likely to impact, remembering to consider local residents, users, businesses and stakeholders, other areas of Council operations or Council staff.

"Level of impact" is about the potential impacts of the project – impacts at both the planning and implementation stages.

To identify the potential impact of the project, consider:

- The geographical area or extent of the work (ie. will it be the whole of the LGA or just one street?)
- The scale of the work (ie. a new footpath for a street is a smaller scale than a communication tower which has a relatively small physical footprint but is of a relatively large scale)
- Who is likely to be impacted? (see potential stakeholders list to generate thinking)
- Other impacts (such as health risks, new procedures, increased costs, etc.)

"Level of interest" relates to the interest generated by the project within the community, stakeholders, business or Council officers.

To identify the potential level of interest, think about:

- Have similar issues or projects generated a lot of interest?
- Has the project been generated from within Council or in response to submissions from the community?
- Are there organised groups concerned about this issue?
- Does the project have the potential to have a negative impact (this usually generates a higher level of interest)?

Consider the history of the project, and importantly, you may need to consider the experience of Council with similar projects or issues in the past. You may also need to refer previous or current media coverage and understand if there is any existing political interest in the project. Also understanding if other issues have impacted the particular community, this could be other Council projects or services, other government projects, services or policies or even natural occurrences. Use this guide to assist you.

You do need to record your level of impact/interest in the Engagement Plan.

In order to determine the level of impact/interest, review against the following criteria.

Level 1 (High – City of Ryde)   High level impact on the whole or a large part of the City of Ryde

Level 2 (High – Local)   High level impact of a local nature, e.g. a local area, specific community or user group

Level 3 (Low – City of Ryde)   Lower level of impact on the whole or a large part of the City of Ryde, specific community or user group

Level 4 (Low– Local)   Lower level of impact of a local nature, e.g. a local area, specific community or user group

The following table shows a description of the Impact/Interest Criteria and examples.

Level of Impact/Interest

LEVEL 1 (High – City of Ryde) Criteria (one or more of the following)	Examples
High level of real or perceived impact across City of Ryde.	Key strategies & Plans e.g Local Strategy, Management Plan, Social Plan, Environmental Plan, Asset Management Plan, Budget. Major development Council is involved in e.g. West Ryde
Any significant impact on attributes that are considered to be of high value to the whole of City of Ryde such as the natural environment or heritage.	Plans of Management (district or regional) or Community Water Conservation Strategy.
Any impact on the health, safety or well being of the City of Ryde Community.	Removal of a facility or service catering for City of Ryde e.g. library, RALC, sporting facilities.
Potential high degree of controversy or conflict.	Provision of a regional facility i.e. skate park, sports centre.
Likely high level of interest across the City of Ryde.	Key changes to City of Ryde wide service, e.g. waste services.

LEVEL 2 (High – Local) Criteria (one or more of the following)	Examples
High level of real or perceived impact or risk on a local area, small community or user group of a specific facility or service.	Removal or relocation of a local playground or kindergarten.
The loss of or significant change to any facility or service to a local community. Potential high degree of controversy or conflict at the local level.	Change to or loss of valued activity or program e.g. local youth activity.
Potential high degree of controversy or conflict at the local level.	Re-development of a sportsground. Local street road closure. Increase or removal of car parking in a local shopping centre.

LEVEL 3 (Low – City of Ryde) Criteria (one or more of the following)	Examples
Lower, although still some real or perceived impact or risk across the City of Ryde.	Changes to a City of Ryde wide service e.g. closure of a customer service centre on a public holiday.
Potential for some controversy or conflict.	Changes to customer service processes e.g. payment of rates. Changes to the format of the Council website.

LEVEL 4 (Low – Local) Criteria (one or more of the following)	Examples
Lower level of real or perceived impact or risk on a local area, small community or user group of a specific facility or service.	Upgrade of a local playground e.g. installation of new equipment.
Only a small change or improvement to a facility or service at the local level.	Local streetscape upgrade e.g. additional tree planting.
Low or no risk of controversy or conflict at the local level.	Changes to an activity.

NOTE – see next page

Note:

1. At any time during a project, issue or action, it may be necessary to reassess the level of impact/interest and vary the consultation approach accordingly.

2. In the case of non-Council developments, ie. State-significant sites (determined by Planning Minister), developers are required to adhere to the State Government's requirements for consultation. In these instances, Council will identify and provide submissions on the impacts and issues for the Ryde community. Details should be placed on Council's website.

STAGE 2 – Work It Out

Step 4 – Level of Engagement and Key Messages

Aim - Identify what level of engagement could be and what the key messages for communication

Key Steps	Tools & Resources	Methodology & Template
☐ Consider your strategic objectives for engagement ☐ What level of engagement should you choose based on the impact/interest and negotiables/non-negotiables?	☐ Engagement Matrix ☐ How to Develop Key Messages ☐ How to Get People Involved and Motivated	T8 G1 G2

As mentioned in the Part One of the Engagement Framework Council has three levels of engagement, Inform, Consult and Active Participation.

You need to determine the level of engagement that is required, inform, consult or active participation.

If your project, policy, plans or service is required to meet legislation such as the *Local Government Act 1993, Environmental Planning and Assessment Act, 1979, funding agreements or other agreed policy or procedures* the Engagement Framework should be used to improve on those processes already required.

Prior to a project, policy, plan or service being approved by Council, it may be appropriate to identify opportunities for community involvement in its implementation. These can be enhanced further once the project, policy, plan or service has been formally adopted.

So what level do you choose?

This decision becomes one that either your or the project team will make through the information you have based on the need for engagement, negotiables/non-negotiables and level of impact/interest the project has.

Key Messages

The key issues of the project need to be identified in advance, given to the right stakeholders with adequate time allowed to respond to issues and incorporate changes.

Helpful hint

Key messages are not "spin" or a communication constructed to market the project. They must not be crafted to "sell", promote or otherwise influence how the issue(s) are viewed or understood.

Key messages provide the consistent underpinning of all communications, for example:

"An important project, project, x, will be happening in your area soon (timeframe).
This project may impact you (traffic, noise, environmental, visual impact, etc).
We are seeking to minimise impacts and need your input so that we can better understand your needs."

Every project needs key messages. Highlighted below are some key messages for each level of engagement.

INFORM

KEY MESSAGE: "things you need to know that might affect you"

CONSULT

KEY MESSAGE: "please tell us what you think"

COLLABORATE

KEY MESSAGE: "please work with us to determine the best way forward"

Key messages are essential in order to:

- Be consistent
- Minimise confusion and misinformation
- Ensure that the project team is consistent and aligned
- Develop communication materials that provide accurate information in plain English
- Provide a focus for the purpose of the engagement – that is, they help to ensure that the right questions are asked to get the answers that are needed in order to progress a project.

The toolbox has more information about key messages and how to develop them.

TOOLS: T8: Engagement Matrix
G1: How to Develop Key Messages
G2: How to Get People Involved and Motivated

Step 5 – Identify Stakeholders and Target Audience

Aim - To build up a basis of knowledge of who the stakeholders are in order to develop a plan for engagement

Key Steps	Tools & Resources	Methodology & Template
☐ Identify who the target audience is to determine the stakeholders ☐ Review the current status of your relationships with these stakeholders ☐ Understanding stakeholders and how they can contribute and participate in your project	☐ How to Identify Stakeholders ☐ Building a Stakeholder Tree Developing a Mind Map ☐ Stakeholder Profile ☐ How to Identify Target Audience and Stakeholders and How They Inter-Relate ☐ Working with Hard-to-Reach Groups	T4 T5 T6 T7 G3 G4

Once you have identified what you are engaging on and what can be influenced, you can start planning your approach.

"Target audience" is the catchment area for the engagement process – who needs to be aware so that they can choose whether or not to be involved. This may be a geographical area, like a suburb, or users, such as the parents of children in a childcare.

"Stakeholder" is an individual or group which has a specific interest in one or more aspects or impacts of a project.

The first step is to identify the target audience – the physical or geographical area or user groups who must be included with information about the project. ***Once you have done this, your target audience can be treated as a stakeholder.*** This will make it easier for the project team to manage while ensuring this important group are still always included.

In order to determine the most appropriate activities you will need to know **who** you wish to involve. Once that is determined you can asses **how** to involve them.

This is one of the most important aspects of engagement projects. Usually this audience is quite diverse, and should include:

- People directly affected by the project
- People or groups with an interest in the project, such as Council staff, environment and community groups
- Agencies and organisations with an interest either directly in the project or through their constituency – such as government agencies, local services, community organisations
- Local MP's (state and federal) and Councillors
- Don't forget Customer Service! They are an important stakeholder providing frontline information about projects and services.

Helpful hint

If a project has a high impact across a wide area, or is contentious or sensitive, then providing information to a wider group is required.

Ensuring that everyone who might have an interest in a project is invited to participate is perhaps one of the most important steps. Many projects that were not originally highly sensitive have become so because of a failure to involve key stakeholders in the engagement process.

Tool 4: How to identify stakeholders

The How to Identify Stakeholder list provides a guide for the project team in identifying information sources about stakeholders – where to go to find out about potential stakeholders. This part of the research you need to undertake to understand who you need to be engaging with. Following is an example from the toolbox how you might use the list.

Helpful hint
Remember – "Stakeholder" includes target audience – don't forget to include them!

Think about:

- Community Information Directory – Council's database of community groups, available on the intranet or get a copy from the Library.
- Advisory Committees
- Other teams across Council – particularly Customer Service. They can be very helpful if involved early and briefed well.
- Review of previous engagement processes to identify stakeholders
- Are there any major facilities or services in the area? e.g. schools, hospitals, public transport?
- Will these services/facilities or users of these services be affected in any way?
- Identify local residents, visitors or businesses likely to be impacted – those that use, visit or rely on the area affected by the project.
- Are there existing and active groups in the area? Are they general interest or aligned to one issue? Are they likely to have major, little or no interest in the project?
- Has the project, or a similar proposal, generated strong community or media interest in the past?
- Does the project have a history – has it been difficult to progress, has it been generated from community action, controversy or public interest?
- Does a local Councillor or other significant community member have a particular interest in the project?

Another simple process to use is to build a stakeholder tree or you can build a stakeholder mind map. Examples of these are in the toolbox.

Helpful hint: Building a Stakeholder Tree
Identify stakeholders and target audience
Every time you talk or make contact with anyone on the project, ask them who else should be involved and find their contact details. Contact these people and tell them that you were told they might be interested. In turn, ask these new people who else should be involved. When new names or groups are no longer being suggested, you know that you have identified pretty much everyone that needs to be involved.

Once suggested groups are identified, the level of interest and impact on stakeholders can be estimated and an appropriate level of engagement activity identified.

Alternatively, you may need to identify stakeholder groups internally prior to any external engagement. Use a similar approach with colleagues and other Council officers as you scope who you should be engaging with.

What do I know about the stakeholders?

The Stakeholder Guide provides an outline of questions to use when talking with stakeholders. The Guide has been developed to help you in remembering all the information that the stakeholder may have that can be of interest and use to the project. It is not meant to be prescriptive – you may need to ask the stakeholder many more questions than just these! It is just a guide to help you as you build up a picture of the stakeholder that might be interested in the project and how you can involve them.

It can also help guide your first contact with new organisations and people as well as provide valuable information for developing an appropriate engagement process and building relationships. Use it to guide discussions and telephone conversations when scoping the stakeholders.

Helpful hint: Building a Stakeholder Tree
Some of your stakeholders may be able to support the engagement process with their local knowledge, skills and contacts within the community.

Tool 5: Stakeholder Profile

Example – Upgrading a local park – Sporting Group

Question	Answer
1. Who does your organisation or group represent? (Age, area, type, cultural background, gender, etc.)	**Local soccer association: boys and girls from 5–16, over 35's, parents**
2. How do you communicate with your constituency/members/users?	**Through newsletter and team meetings; informally at games and through the tuckshop**
3. Do you meet regularly?	**Yes, weekly**
4. If we needed to provide information to your group and its users, what would be the best way to do that?	**Via our President; through a flyer we can distribute at the tuckshop during games**
5. What do you think would be the best way for us to engage with your constituency for this project?	**Through our team meetings**
6. Would it be appropriate for us to come and talk to your organisation about the project – should we come to a meeting or is there some other way?	**You could come to our next general meeting.**
7. Is there anything we need to do, or bring, to make sure that your members can participate in the project? Do your members have any special needs?	**Pictures of what is happening and information of what changes are occurring.** **What can we influence or change if we don't like what is planned?**
8. Who else do you think we should be talking to?	**The other associations that play in our competition.**
9. Do you know how I could contact them?	**Yes, information is available on our website and we can give you the direct contact details. Do you need an interpreter?**

Once you have spoken to all the key stakeholders, and you have completed your project team assessment of the level of impact and interest, you will be able to start designing an appropriate process.

The Engagement Toolbox provides more information on how to use the Stakeholder Checklist and the Stakeholder Scoping Guide.

Hard to reach groups

The community of Ryde has changed over recent years and over a third of our population speak a language other than English at home, or identify with another culture.

These people and some other target groups can be very hard to reach. These groups tend to be:

- Children and young people
- Older people
- Working families
- People of different cultures and linguistic backgrounds
- People with disabilities and carers of people with special needs
- People who rent
- 18-35's

It is **essential** that you use existing community organisations and groups to reach these audiences, as they can assist to identify the best way to engage with these groups. Importantly, if you do that, you need to take their advice – if not, the relationship with the organisation as a whole could be negatively impacted. Generally, community groups will help you organise special meetings or events. They may require some assistance, such as some money, to do this. Usually it is much more cost effective to do this than to risk not engaging these groups or using another method that might not work.

Staff in Council's Community Services team have many contacts with these groups and could assist in identifying appropriate strategies for engagement.

The Engagement Toolbox provides more detail and information about how to reach hard to reach groups together with suggestions and ideas about understanding what motivates people to participate.

When using the Engagement Matrix take particular care to make sure that you have identified strategies that will reach each of your identified stakeholders. The "gap analysis" approach outlined in Step 6 will help to ensure that your approach is complete.

☐..☐..☐..☐   *Not all stakeholders in a particular group or sub-group will necessarily share the same concerns or have unified opinions or priorities.*

> **TOOLS: Tool 4: How to Identify Stakeholders**
> **Tool 5: Stakeholder Profile**
> **Tool 6: Building a Stakeholder Tree**
> **Tool 7: Developing a Mind Map**
> **Guide 3: How to Identify Stakeholders and Target Audience and How They Inter-Relate**
> **Guide 4: How to Work with Hard-to-Reach Groups**

Step 6 – Identify Activities and Strategies

Aim - Understand the range of engagement strategies required

Key Steps	Tools & Resources	Methodology & Template
☐ Decide on what activities to use	☐ Engagement Matrix	T8
☐ Consider the individual skills and	☐ Engagement Plan	T9
capacities needed for engagement	☐ Engagement Strategies	G5-46

Once you have identified the level of interest and target audience, understand what can be influenced and have a solid stakeholder database, you are ready to plan your activities.

You need to design an engagement process that is appropriate to the size, impact, level of interest and complexity of the project and anticipated number of interested affected community members and stakeholders.

You may already know some of the activities and strategies that you need to undertake. This may be because:

- There are statutory requirements, such as a public hearing for the development of a Plan of Management
- Existing activities will lend themselves to your project, as when a Council community expo is scheduled during your project
- Stakeholders have suggested or asked that you undertake particular activities
- Previous experience has confirmed successful approaches

The Engagement Matrix has been developed to provide a consistent framework across Council of what strategies must be used dependent on the type of project.

It allows you to build on the information you have gathered so far to identify what strategies will be appropriate and effective.

If your project, policy, plan or service is required to meet legislation such as the *Local Government Act 1993, Environmental Planning and Assessment Act, 1979, funding agreements or other agreed policy or procedures* the engagement framework should be used to improve on those processes.

It is important to record all information about strategies implemented and the feedback provided from the community and stakeholders. You must record the details of all strategies, particularly in consult and collaborate. It is important to record the who, what, when, where and the feedback provided. This will not only assist in accurate recording of the project but may also inform other projects.

> **TOOLS: Tool 8: Engagement Matrix**
> **Tool 9: Engagement Plan**
> **Guides 5-46: Engagement Strategies**

ENGAGEMENT MATRIX

The Engagement Matrix has been developed to help you decide what activities to use. Some activities are mandatory – they **must** be undertaken as a minimum on all projects. Others may be required on some projects but not on others.

The Engagement Matrix can be used on its own or in conjunction with other project management tools such as the Business Case and Project Management Plan, both of which identify potential project risks and mitigation measures. Engagement activities are often very effective project risk mitigation measures as well as effective communication activities.

> **Helpful hint: Don't forget!**
>
> There are three levels of engagement:
>
> **Inform:** telling people about an issue, project or plan
>
> **Consult:** providing people with information and asking them what they think
>
> **Collaborate:** to partner with people to develop a project, plan or progress an issue and consider advice into decision making.
>
> *Remember...* you need to inform before you consult or collaborate and in most cases you will also need to go back to informing throughout the life of the project.

USING THE ENGAGEMENT MATRIX:

The Matrix works in two ways.

Across the top are the levels of impact/interest identified in **Step 3: Identify impact/interest level for your project using Tool 3.**

Down the left hand side are the strategies, moving from 'inform' through to 'collaborate'. All projects will have elements of information throughout various stages of the project. The more complex a project, the higher the level of interest and the more negotiables, the more participatory activities will be and the more decisions will be shared.

In **Step 4: Level of Engagement & Key Messages** you determined the level of engagement that the stakeholders would have based on your key messages.

Using the information gathered in Steps 3 and 4, and taking into consideration the information you have gathered from stakeholders on the optimum way in which to engage with them, together with knowing who your wider target audience is, the Matrix will help you to identify the activities that will suit your project, your audience and your stakeholders.

There are three levels of activity:

KEY	
M	Mandatory (M) – these activities must be undertaken
R	Recommended (R) – consider using these activities
O	Optional (O) – these activities may be appropriate depending on the project, time and budget allocation

To use the matrix, find the Level of Impact/Interest that corresponds to your project. Those marked with an R must be considered and those with an O may be appropriate. You must understand and be ready to explain why you didn't use these strategies.

Some of the strategies have a range of ways they could be undertaken, the Community Engagement Toolbox provide information on these different ways. Refer back to the work you have already done during **Step 5: Identify stakeholders and target audience** and draw on the information gathered during this process.

The most effective way to identify whether your engagement strategies are meeting all your stakeholder needs is to create a "gap analysis" approach. List all your identified stakeholders down one side of a page and those activities that you have identified as appropriate from the matrix. Working across from each stakeholder group, identify which of the selected strategies will reach each stakeholder group. Some strategies will reach a lot of groups, while others may only reach some.

Once you have identified the strategies/activities appropriate to your project, consider:

- Is there a natural order to the timing associated with the activities?
- Is there base information which will be needed in order to inform different strategies/activities? For example, if you need to draft an advertisement, use a leaflet to invite people to an event and update the website, you probably will be drawing on the same information. This may influence how you schedule and plan activities.
- How can these strategies/activities link with the schedule of activities identified in the Project Management Plan?
- Are there existing activities that can be used instead of organising an additional activity? Can I link into another event?
- Have you consulted the Events Calendar to see when your activities need to be scheduled and whether there are any conflicts or whether you can work with other units on your activity?

TOOLS: Tool 8: Engagement Matrix
Tool 9: Engagement Plan
Guides 5-46: Engagement Strategies

Engagement Matrix – T8

KEY	
M	Mandatory (M) – these activities must be undertaken
R	Recommended (R) – consider using these activities
O	Optional (O) – these activities may be appropriate depending on the project, time and budget allocation

External and Internal Stakeholders

Guide		Engagement Strategies	Level of Impact/Interest			
			L1 High LGA	L2 High Local	L3 Low LGA	L4 Low Local
19		**Customer Service** (information provided to this service unit to ensure they have the correct information to advise the community when they visit or call)	M	M	M	M
9, 10		**City of Ryde Website & Intranet**	M	M	M	R
18		**Councillors' Information Bulletin (CIB)** (internal weekly document provided to all Councillors)	M	M	M	R
25, 7, 38		**Fact Sheet/Brochure/Q&A Sheet** (simple snapshot of information)	M	M	M	O
15		**Council Advisory Committees** (formal Committee of Council)	M	M	R	R
16		**Council Report** (report provided to all Councillors and available to the public)	M	M	R	O
36		**Public Information Session** (large session to provide information about a project)	M	M	O	O
40	INFORM	**Ryde City View Newsletter**	M	R	M	R
31		**Media Release** (including ethnic and community media)	M	R	R	R
13, 42		**Community Information** (information provided on local bulletin boards, all libraries, site signs, display boards etc)	M	R	R	R
11		**Community Networks** (presentations or information provided to existing networks)	M	R	O	O
30		**Mayoral Column** (fortnightly column provided in both local papers)	M	O	R	R
6		**Advertisement/Newspaper** (place an ad in the local, metropolitan or ethnic papers) (If legislated, this is mandatory)	R	O	O	O
23		**Events** (provide information at Council and other community events)	R	O	O	O
39		**Rates Notice** (notice sent to all ratepayers once a year or with quarterly payments)	R	O	O	O
20,29		**Direct Mail/Mailbox Drop** (letter addressed to resident or a letterbox drop to the household)	O	M	O	M
33		**Personal Contact** (site meetings, telephone, interview offered, doorknocking)	O	R	O	R
32		**Multimedia** (use of technology such as DVD, MP3, pod casts etc)	O	O	O	O

Engagement Matrix – T8

External and Internal Stakeholders

Guide		Engagement strategies	Level of Impact/Interest			
			L1 High LGA	L2 High Local	L3 Low LGA	L4 Low Local
50	CONSULT	**Provide Feedback** (information provided to participants on the outcome of their contributions through a range of methods)	M	M	M	M
24		**Executive Team Briefing** (internal process for Council staff to discuss projects with Council's executive team in a confidential setting)	M	M	M	R
50		**Comment on Revisions** (provide 1 week for participants to comment on revised documents, plans or projects)	M	M	R	R
33		**Personal Contact** (opportunity for stakeholders to talk to Council staff which could include site visits, telephone, interviews etc)	M	M	O	M
26		**Comment Forms** (a form developed for a specific project which highlights areas to make comment on)	M	M	O	R
44		**Focus Group/Workshop** (session to target a small number of people, often more detailed discussion, open to any participants)	M	R	M	O
17		**Councillor Workshop** (internal process for Council staff to discuss projects with Councillors in a confidential setting)	M	R	R	O
15		**Council Advisory Committees** (existing Committees of Council)	M	R	O	O
35		**Public Exhibition Period** (a formal period where information is available for all to comment on) (if legislated, this is mandatory)	M	O	R	O
43		**Surveys** (can be through self completion, telephone, website or hand delivered)	R	R	M	R
42		**Vox Pops or Listening Posts** (opportunities for the community to have their say in their words)	R	R	O	O
36		**Public Forum** (forum for a large number of people)	R	R	O	R
23		**Events** (attend an event to gain feedback from the participants through a graffiti board, survey, competition)	R	O	O	O
44		**Random Focus Group** (random targeted participants in a small number of people, often more detailed discussion, open to any participants)	R	O	O	O
28		**Interactive Displays** (displays and information provided where staff can talk to stakeholders about a project. These often occur in shopping centres or parks)	O	R	O	R
	COLLABORATE	**Steering Committee** (a formal committee that steers a project involving external stakeholders)				
50		**Provide Feedback** (ongoing formal feedback provided)				

* Collaborate strategies are minimal and the Level of Interest/Impact has not been identified at this stage. Over time, these strategies may expand.

You need to record your Level of Engagement and Strategies from the Matrix in the Engagement Plan.

You also need to remember that the Evaluation Form must be completed as well.

Helpful hint

Refer to the Helpful Hints in the toolbox for a detailed description on each strategy or activity and tips on how to deliver the strategies.

There are also a range of external resources which provide guidance on how to deliver these and other strategies to engage the community.

Provide feedback throughout the process

Essential to the engagement model is providing feedback throughout the process. Feedback to participants reinforces that their issues have been heard by Council, and that decisions and action will follow as a result.

Feedback allows Council to demonstrate that they have listened to the community and understood their issues. Whilst it may not be possible to address all concerns, the key themes need emphasising together with an indication of what the next steps in the process will be, for example what Council are proposing to do in response to what they heard and when.

Feedback needs to do two things:

- It needs to reflect what people have told Council about the project
- It needs to highlight the changes made as a result of the engagement or if no changes have been made, why not.

Good feedback also includes information about the project status, timeframes and key milestones where appropriate.

Anyone who provides written feedback must receive a response including stakeholder groups. This response must be accurate and timely – it needs to occur as soon after the engagement process as possible.

Examples of Feedback Techniques

Feature in Ryde City View Newsletter
Direct written response to all who made submission or who attended/were involved
Leaflet/letterbox drop
Media release, Mayoral column
Posters, displays in public libraries
Update website/intranet/technology
Meeting or feedback session
Networks

Helpful hint

It is important to note that feedback is not the same as evaluation. Feedback provides information back to participants on what they said and suggested, and how this has been taken into consideration by Council.

Evaluation is an internal tool that allows Council to assess how the engagement process was designed and implemented, what worked and what didn't and helps in capturing these 'lessons

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TOOLS: Tool 9 Engagement Plan
Guide 50: Feedback Technique Checklist

☐..☐..☐..☐..   *It is both good practice and common courtesy to follow up with stakeholders whom you consulted, to let them know what has happened and what the next steps in the process will be.*

STAGE 3 – Do It and Review It

Step 7 – Engagement Plan and Feedback

Aim - To plan and effectively carry out engagement activities with stakeholders and report back to stakeholders

Key Steps	Tools & Resources	Methodology & Template
☐ Design and prepare the engagement process	☐ Engagement Matrix	T8
	☐ Engagement Plan	T9
☐ Confirm timeframes, budget, processes for managing submissions, etc.	☐ Engagement Strategies	G5-G46
	☐ Engagement Event Checklist	G47
☐ Determine feedback process	☐ Guidance on How to Gain Participation in Activities	G48
☐ Determine what skills are needed		
☐ Engage with stakeholders	☐ Guidance on Facilitating Workshops/Public Meetings/ Group Activities	G49
☐ Design and prepare process for feedback	☐ Reasons for Feedback	G50
☐ Report back to stakeholders	☐ Feedback Technique Checklist	G50

This step pulls together all the planning and preparatory work into a comprehensive project plan. The Project Management Plan in PM-COR provides the framework for developing an effective engagement plan which will guide key activities.

In developing the Project Management Plan, refer to the toolbox to help identify what you will need in order to implement the engagement activities

When using PM-COR, the Engagement Plan in the toolbox is the same.

The Engagement Plan provides a template for the project team which will record all the steps from the Framework and allow you to develop a coherent implementation plan.

Consider the following issues when completing the Engagement Plan:

Timeframe
Establish the likely timeframe of the project and the stage at which engagement activities need to occur. The type of consultation activity chosen will impact the length of time needed for preparation, engagement, review submissions, and incorporate feedback to plans. This may take several rounds and reviews.

Provide adequate notice for people to attend engagement activities and double check that dates do not conflict with school holidays, major sporting, religious or cultural events.

Helpful hint
Maintaining flexibility is a key to success.
- You will/should need to schedule meetings or events at times that suit the audience, rather than the project team. You may need to bring events forward, or delay them, or "piggy back" on existing activities in order to reach your audience effectively. You will need to consult with the project team and consider the risks and constraints identified earlier to understand if there are any risks with these changes.
- You may also need to change your planned approach for a variety of reasons, political intervention, and feedback from the community or budget or time frame changes. Make sure if this does occur you inform Council and the community so they understand and you can manage the expectations.

Managing submissions

Establish a process to respond to public submissions and enquiries. Will enquiries be responded to on an individual basis or summarised as a whole? Recording written, electronic and telephone contacts. If there are expected to be large number of public submissions how will this be managed e.g. consultation software programmes, database.

Guidelines under the EP&A Act are minimum requirements. Refer to Step 6 for the process to provide appropriate feedback.

Skills

What skills and experience exist within the project team? These could be professional skills (such as those with training in public speaking, for example) or it could be natural attributes, such as a member of the project team who is simply great with people, or another who is excellent at explaining complex ideas in plain language. Incorporate these skills wherever possible. Don't forget that a lot of engagement activities need a lot of organising! Good administration and organisation skills are also really helpful.

Helpful hint: Building a Stakeholder Tree

Some of your stakeholders may be able to support the engagement process with their local knowledge, skills and contacts within the community. Often these people, even if they disagree with elements of the project, can support you in delivering the engagement processes.

Budget

Engagement processes should be incorporated into the planning for any project, inclusive of the budget required.

If strategies are combined with others across Council, undertaken early in a project and clear about the project and its negotiables and non-negotiables, it will limit money spent on addressing issues that generally arise at a later stage if engagement is not done well.

Within the toolbox, each strategy identifies a likely budget for implementation, if using that strategy alone. These budgets are designed to provide a guide or indicator to costs and judgement will be required in determining the exact budgetary implications of an engagement strategy.

> **TOOLS:** Tool 8: **Engagement Matrix**
> Tool 9: **Engagement Plan**
> Guide 5-46: **Engagement Strategies**
> Guide 47: **Engagement Event Checklist**
> Guide 48: **Guidance on How to Gain Participation in Activities**
> Guide 49: **Guidance on Facilitating Workshops/Public Meetings/ Group Activities**
> Guide 50: **Reasons for Feedback/Feedback Technique Checklist**

Engagement Plan – T9

Name of Project		Negotiable/Non-Negotiables	
Level of Engagement		Level of Impact/Interest	☐ Level 1 – High LGA ☐ Level 2 – High Local (please tick) ☐ Level 3 – Low LGA ☐ Level 4 – Low Local
Key Messages			

Stakeholder Group name	Engagement Matrix Strategy	When will the engagement activity occur?	Skills	Who	Budget	Feedback Process	Progress reporting – when and how?	Evaluation
(e.g. other Council unit, Community Group, Government Authority, etc)	(e.g. focus group, email, newsletter, Council workshop, event, survey, fact sheet, multi-media, intranet, website)		(e.g. facilitator, scribe, photographer, public relations, writing media releases, conflict resolution, negotiation, inter-personal skills, relationship building, presentation)					

Officer	Date	Manager/Group Manager	Date

Step 8 – Evaluation

Aim - Review the process itself to improve future management

Key Steps	Tools & Resources	Methodology & Template
☐ Evaluate the strategies used from Matrix to identify if process was effective ☐ Evaluate if the issues identified influenced the project outcome. What has changed as a result of the engagement process? ☐ Put learning into action	☐ Evaluation Template ☐ How to Develop an Evaluation Strategy ☐ Record in Lessons Learnt Log	T10 G51 PM CoR

Evaluation is key stage of every project and, while it is generally the last activity on the project plan, it needs to be planned for and incorporated at every stage of the project. This will ensure that the community will continue to be involved and that you have an opportunity to review your engagement processes based on feedback.

As with Feedback, evaluation is mandatory – it is part of good project management and is a requirement for all engagement strategies.

There are two components to evaluating a project:

1. Internal - the project team gather information and review the process and outcomes to identify strengths and weaknesses, what worked and what didn't and what can be done better next time.

A dedicated project team meeting to evaluate the project against the engagement process developed at the beginning of the project will also provide an opportunity for reflection. In particular, the team should ask:

- What worked?
- What didn't work?
- How would we improve next time?

2. External - how participants and stakeholders perceived the process and its outcomes.

Capturing feedback on the process (as well as the intent) of the project from the community involved through events and activities can be achieved by distributing feedback forms, personal discussion, on line surveys, emails, graffiti boards, etc. The most powerful approach is one which engages stakeholders directly, asking them to evaluate whether they believed the project was successful in terms of the principles for engagement of Council for the project. This can be done via email, letter or telephone. The results of these can then be included in the overall review process.

It is important that the evaluation is practical, efficient and effective. We therefore suggest that you focus on three key questions:

1. Did the strategies that you used from the Matrix enable you to engage the right people and get the right information from those people?
2. Were the resources adequate and what could have been done differently to ensure that they were used more effectively?
3. How have the issues identified influenced the project? What has changed as a result of the engagement process?

Evaluate the engagement process when finished and provide the findings and process issues to other departments within Council. This is essential in assisting all council staff to further develop their skills and strategies and also can be fed into the evaluation of the Engagement Framework itself.

Tool 10 – Evaluation

Evaluation Template – T10

OVERALL ENGAGEMENT ASSESSMENT			
Engagement Strategies (Did the activities meet the needs of the targe audience and can these be improved?)		**Resources** (Were the resources adequate and what could have been done differently to ensure that they were used more effectively?)	
Engagement Objectives Did the project meet the objectives identified?		**Did it work?**	
Have the issues identified influenced the project? (What has changed as a result of the engagement process?)			
Overall how well did it go?	Worst case scenario Best case scenario		

PRACTICAL REVIEW	
What went according to plan?	
What didn't go according to plan?	
What would you do differently next time?	
Did the engagement make an impact on stakeholders' views and/or behaviour?	
Did the engagement make an impact on Council's views and/or actions?	
Are there any ways you can suggest to improve internal engagement?	

> **TOOLS: Tool 10: Evaluation Template**
> **Guide 51: How to Develop an Evaluation Strategy**

Glossary

CIB	-	Councillors' Information Bulletin
CID	-	Community Information Directory
CoR	-	City of Ryde
EP&A Act	-	NSW Environmental Planning and Assessment Act 1979
LG Act	-	Local Government Act 1993
LGA	-	Local Government Area
PM-COR	-	Project Management – City of Ryde
Q&A	-	Question and Answer
RALC	-	Ryde Aquatic Leisure Centre
YCYV	-	Your City, Your Voice