Stakeholder engagement toolkit

Department of Health and Human Services

Contents

Introduction

Stakeholder engagement and public participation are integral elements to the Department of Health and Human Services (the department) work in developing, designing and implementing services and policies that benefit all Victorians. Victoria is a highly diverse population and our stakeholder engagement and partnership activities need to recognise and support this diversity, so that it is reflected in our policy and service outcomes.

Stakeholder engagement can occur for a variety of reasons and the purpose of engagement can range from relationship development and community capacity building through to public participation to inform government decision making and policy development. The department is going through an unprecedented period of reform that requires effective and representative engagement at all levels to ensure the department is able to meet the needs of the sector, our workforce and the Victorian community.

In addition to improving our work, effective engagement improves participants' understanding of government processes and the decisions the department makes. As such, our stakeholder activities have shifted from traditional methods of 'deliver and inform' to 'involve and collaborate'.

Purpose

This toolkit provides a step-by-step guide to developing and implementing a successful stakeholder engagement plan. For each step in the process, a template is included to support users in developing their plan. It builds on the Public participation framework (DHHS 2018) <https://intranet.dhhs.vic.gov.au/stakeholder-engagement>, which establishes the principles, definitions, priorities and strategic direction of the department's stakeholder engagement work.

The toolkit aims to:

- support consistent stakeholder engagement practice across the department
- build staff capability and skills in stakeholder engagement
- provide practical tools to support effective, inclusive and appropriate engagement.

To achieve these aims, the toolkit was developed in line with the Victorian Auditor-General's Office *Public participation in government decision-making: better practice guide*, and is informed by the findings of the *Public participation in government decision-making* audit report.

When to use the toolkit

The department recognises that many program and policy areas are already implementing effective engagement strategies. This toolkit is not intended to replace that work.

The toolkit is aimed at staff undertaking stakeholder engagement who need guidance or advice at any stage of their project. It represents best practice stakeholder engagement and includes prompts to get you thinking about the important elements of good engagement.

Ultimately, the decision of when to use (and when not to use) this toolkit rests with individual staff. However, the approaches shared in this document represent a basic minimum standard of engagement planning that staff are strongly encouraged to meet.

Steps to successful stakeholder engagement

Step 1: Purpose

The first step in successful stakeholder engagement is to clarify the purpose of your engagement project. Having a clear purpose will help focus your objectives and maximise the impact of your activities. Understanding the purpose of your engagement also allows you to clearly communicate with your stakeholders.

To clarify the purpose of your engagement, it is important to:

1. **Define the purpose***.* From the outset, it is important to define the reason for undertaking your stakeholder engagement. This may involve outlining the problem you are trying to address, the decision you wish to reach or the relationships you wish to build. Understanding why you are reaching out to stakeholders will inform all subsequent parts of the engagement process.

2. **Define the objectives.** It is also important to define the desired outputs of your engagement process. Are you trying to reach a certain decision or hoping to gather feedback on a proposal? Whatever the reason, the project objectives should be clearly and specifically defined.

3. **Project objectives vs. engagement objectives.** Objectives may vary for each stage of the project and may differ from the overall project objective. For example, a **project objective** may be to implement a new app to help service users find local services and the **engagement objective** may be to inform potential users how to access the app.

4. **Outline the scope and limitations.** Your engagement process will necessarily be limited by a range of factors. These may include time, staff, transport, funding and stakeholder capacity. It is important to outline the scope and limitations of your engagement as this will allow for a transparent and achievable engagement process.

5. ***Identify negotiable and non-negotiable elements.*** Each engagement project will have a set of factors or decisions that can be influenced by stakeholders and a set that cannot. These are your negotiable and non-negotiable elements. It is important to identify these elements at this stage so they can be communicated clearly to stakeholders during the engagement process. This will allow your stakeholders to understand what they can influence and where there energy is best spent.

Key questions

Answering the following questions will help you understand the underlying purpose of your engagement:

- Why do you need to engage?
- Will you need to engage in more than one way? For example, forums, interviews, workshops, surveys.
- What will success look like?
- What engagement skills do you have within your team? What skills need developing?
- What are your limitations?
- What resources do you have available?

[Template 1](#) will assist you to clarify the purpose of your engagement.

Step 2: Stakeholder identification

Stakeholder identification will help you make informed decisions about who to engage with and how best to do so. In the stakeholder identification process, you should also consider the level of influence of the stakeholder or stakeholder group and their capacity for committing to the project.

Identify your projects stakeholders

The department has many stakeholders as a result of our wide-ranging responsibilities for the health and human services portfolios. Your stakeholders may include:

- the Victorian public, service users and clients
- health and community service organisations (CSOs)
- Aboriginal groups, peoples and organisations
- experts, peak bodies, community groups and advocates
- local, state and federal government agencies
- our portfolio ministers.

Inclusive participation

Inclusive participation is a fundamental element of good stakeholder engagement and a priority for the department. The Victorian community is diverse and includes people of different backgrounds, needs, values and aspirations. When identifying your stakeholders, it is important that you encourage and support a diverse range of stakeholder input to properly reflect the Victorian community.

It is important to not only engage with your high influence stakeholders but to encourage and seek participation from stakeholders who may not be frequently heard or who may be harder to reach.

Fostering inclusiveness and valuing difference means it is often necessary to tailor engagement processes to enable diverse communities and individuals to fully participate. For assistance with building an inclusive engagement plan, refer to the *Public participation framework*.

Careful consideration should be given to:

- the needs and capacities of your stakeholders
- engagement approaches that are responsive to diverse needs, communication and cultural preferences, and that encourage and facilitate meaningful participation and contribution from stakeholders
- barriers to stakeholder involvement and strategies to address them
- resources, mentoring or training that may be required to enable people to participate
- encouraging and seeking out stakeholders who have been traditionally excluded from the process
- using a variety of communication methods to engage harder to reach groups.

Understand the engagement history

Many stakeholders and stakeholder groups will already have a history of engagement with the department or other government organisations. This history will inform how your engagement project progresses and how stakeholders engage with you, your staff and the wider department. It is important to understand the historical context that your project is entering into, and how it might change or reinforce existing relationships.

Helpful techniques to assist with stakeholder mapping

- Develop a list of every stakeholder that may be impacted or interested in your project. At this stage you should think freely and broadly to ensure you do not overlook stakeholders. Avoid limiting your list to familiar stakeholders or people you frequently engage with.
- Research possible stakeholders by using data from the Service Agreement Management System (SAMS), stored client/stakeholder records and local intelligence collected by colleagues.
- Establish a network of key contacts within communities or stakeholder groups who may be able to encourage others to be a part of your project.
- Seek guidance from community leaders or community organisations.

Key questions

- Who will be impacted by the project?
- Who has an interest in the project?
- How can you ensure your engagement is inclusive?
- What are your stakeholders' capacities, needs and limitations?
- Who are the stakeholders who have been traditionally excluded from decision making?
- How can you address the barriers to different stakeholders engaging?
- Who are the project owners and partners?
- What is the project's authorising environment?
- What is the prior history of the engagement with your stakeholders?
- Who are the stakeholders that are critical to project delivery?

Template 2 will assist you with identifying and understanding your stakeholders.

Step 3: Level of participation

Once a clear purpose has been defined and your stakeholders identified, it is important to consider which level of participation your engagement project requires.

Some projects will require a high degree of stakeholder participation throughout the project, while others may require specific groups to have input at different stages. It is important to identify the level of participation your project requires so stakeholders can understand their role in the engagement process.

The IAP2 Public Participation Spectrum

The department has endorsed the International Association for Public Participation (IAP2) Public Participation Spectrum as the theoretical basis for stakeholder engagement. The IAP2 engagement spectrum represents the most widely accepted participation definitions across government and industry, and meets the requirements set out by the Victorian Auditor-General's Office.

The IAP2 spectrum shows that different levels of engagement are legitimate, depending on the requirements of the project. Practical factors including goals, timeframes and available resources will impact the level of engagement that is most appropriate for your project.

The stages of the IAP2 spectrum include:

Inform – providing information to stakeholders.

Consult – obtaining stakeholder feedback on alternatives for potential courses of action or decisions made.

Involve – working directly with stakeholders to ensure that concerns and aspirations are understood and reflected in proposals or policy.

Collaborate – partnering with stakeholders at each stage of a project.

Empower – placing final decision making in the hands of the stakeholder.

For larger, more complex projects, or those with multiple stakeholders, it is likely that you will need to use a variety of different methods to engage different groups throughout the project. These kinds of projects may also require different levels of participation for different stakeholder groups.

It is also important to consider other methods or approaches to engagement if your project is large or complex. While the department has endorsed the IAP2 spectrum as a best practice approach, other approaches may also be useful. For more information, consult the *Public participation framework* or contact the Stakeholder Engagement team at <engagement@dhhs.vic.com.au>

Figure 1: IAP2's Public participation spectrum

IAP2'S PUBLIC PARTICIPATION SPECTRUM

The IAP2 Federation has developed the Spectrum to help groups define the public's role in any public participation process. The IAP2 Spectrum is quickly becoming an international standard.

INCREASING IMPACT ON THE DECISION →

		INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
PUBLIC PARTICIPATION GOAL		To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
PROMISE TO THE PUBLIC		We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision. We will seek your feedback on drafts and proposals.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will work together with you to formulate solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

© *International Association for Public Participation* *<www.iap2.org>*

To determine the appropriate level of participation for your project, consider the following:

- **Purposes and objectives***:* your reasons for engaging and the results you hope to achieve will help to determine which level of participation is appropriate. If your project aims to implement decisions made by your stakeholders, then a high degree of participation may be required. However, if your project simply aims to keep stakeholders informed, then a lower level of participation may be appropriate.

- **Stakeholders**: different stakeholders will have different needs, expectations and capacity. These factors need to be considered in determining an appropriate level of participation and resourcing required for engagement.

  Resources: the resources available to you will have a significant impact on the level of engagement you can realistically achieve. While you may wish to engage stakeholders throughout the project, that may not be compatible with the limitations.

Template 3 will assist you in determining the appropriate level of participation for your project.

Step 4: Develop engagement plan

In the engagement planning process, it is important to tailor your approach and design an engagement plan to address your engagement objectives and meet stakeholder needs and expectations. As stakeholders may have differing capacities to participate in engagement, a tailored approach will help accommodate and encourage diversity in participants.

The plan should also include mechanisms to ensure proper documentation is maintained to demonstrate equitable processes for stakeholders and transparent decision making.

For assistance building an inclusive engagement plan, refer to the *Public participation framework*.

An engagement plan should be a live document that describes how you will engage with the stakeholders that you have identified in Step 2. Specifically, an engagement plan should include:

- purpose
- objectives
- stakeholders
- inclusive engagement plan
- level of participation
- commitment to your stakeholders
- timeframes
- roles and responsibilities
- budget
- resourcing
- limitations
- risks and mitigation plan
- feedback plan
- evaluation plan.

Key questions

- Consider the department's engagement principles (see *Public participation framework*) and ask yourself: Is my plan purposeful, prepared, genuine, inclusive and communicative?
- Are your timeframes and resources realistic?
- Are you engaging early enough in the process?
- Have you established clear parameters with your stakeholders around their level of involvement?
- Do you have the necessary authority and resources to undertake the chosen engagement methods?

Templates 4a and b provide an engagement planning template and a detailed engagement activity planner.

Identify risks

As part of developing a sound engagement plan, it is important to identify the risks associated with your engagement, and propose mitigation strategies. Poorly planned or executed engagement can have a significant impact on policy or project outcomes and can negatively affect stakeholder relationships.

Engagement risks will vary depending on the complexity and scope of your project. You should either develop an engagement risk register or include your engagement risks in your project risk register. Risk management should begin in the planning stages of engagement and be monitored and reviewed throughout delivery.

Risk assessments should be undertaken consistent with the agreed departmental approach to managing risk. The department's Risk management policy and framework <https://intranet.dhhs.vic.gov.au/about-risk-management> assists staff in understanding their risk management responsibilities.

There are a number of common risks in stakeholder engagement, including the following:

- Stakeholder expectations are not met or do not match engagement objectives.
- Stakeholders do not have adequate time to participate, especially when timeframes are tight.
- Certain stakeholders are 'over consulted'.
- Stakeholders are excluded from engagement.
- Stakeholders believe engagement activities are tokenistic or shallow.
- Stakeholders' engagement activities are negatively impacted by internal departmental or government factors (that is, budget cycle, changes to funding and service agreements or machinery of government changes).
- The purpose and objectives of the engagement are not clear.
- The engagement plan fails to take account of the history or previous relationships with stakeholders.

> **Template 4c is a risk assessment template to inform your engagement plan.**

Privacy

The department, along with its funded and contracted service providers, has access to personal information (which includes sensitive information) and health information about clients and staff.

This access is often provided to the department based on trust. Therefore, it is critical the department protects the privacy of this personal and health information.

More information on privacy within the department is available on the privacy page <https://intranet.dhhs.vic.gov.au/privacy> of the intranet.

Ethics

It is important to consider the ethical implications of your engagement activities when developing your plan. The Centre for Evaluation and Research (CER) provides advice and support on ethics applications and departmental ethics processes and requirements. If you have concerns or questions about the ethical impact of your plan, seek guidance from the Centre for Evaluation and Research <https://intranet.dhhs.vic.gov.au/evaluation-research-and-data> via email: <CER@dhhs.vic.gov.au>

Step 5: Implement and monitor engagement

The department is committed to engaging with and learning from stakeholders through genuine dialogue. As representatives of the department we must ensure that we model these values at all times.

With your engagement plan developed in the previous steps, you should be well placed to carry out the required engagement activities. The implementation of the plan should closely follow your plan, while also remaining flexible enough to respond to changing dynamics among stakeholders.

It is important to ensure all engagement staff are well versed in the engagement plan and understand their roles in delivering it. It is also important to communicate clearly with your stakeholders during the implementation process. Ensure your stakeholders are provided with clear and consistent messaging on the process and their role within it.

When implementing your engagement plan, you must remain aware of your stakeholders' needs and expectations to ensure their voices are heard. This is especially true with regard to harder to reach stakeholders or traditionally excluded groups. For more information on working with these specific cohorts, refer to the inclusive stakeholder engagement guidance in the *Public participation framework*.

During your engagement you should also monitor the implementation of individual engagement tasks as detailed in your engagement plan, especially for larger projects. By monitoring your engagement plan you can better manage risks, address issues as they arise, and anticipate or communicate any significant delays.

Key questions

- Are all engagement staff well versed in the engagement plan and their role in delivering it?
- Do you have adequate resources organised to implement your plan?
- What processes have you put in place to obtain and respond to early feedback from stakeholders?
- Is your communication consistent with approved departmental messaging?

Template 5 will assist you to implement your engagement plan and monitor its progress.

Step 6: Feedback

After your engagement activities are complete, it is important to provide meaningful feedback to your stakeholders about how their input and feedback has been used. Reporting back on the stakeholder engagement process will ensure that stakeholders feel that their contributions have made a difference to the outcome of the project. This in turn encourages stakeholders to participate in the future.

When developing your engagement plan in step 3, you also created a feedback plan. All significant stakeholder engagement processes should report back to stakeholders on how they have contributed to the outcomes of the project. Such a report should also respond to any issues raised by stakeholders.

Reporting back could be done by providing participants with written feedback, by holding feedback sessions or forums, or by using digital communication. Whatever the method, it is important you take every opportunity to provide feedback to your stakeholders. Again consider the diverse needs and capacities of your stakeholders in providing feedback.

For assistance in providing feedback in an inclusive way, refer to the *Public participation framework*.

Key questions:

- What input did your stakeholders have and how was it used?
- How will you provide feedback to participants?
- What communication methods will you use?
- How will you communicate your engagement process or project's outcomes, successes and learnings?

Template 6 will assist you to provide sufficient and timely feedback to your stakeholders.

Step 7: Evaluate

All engagement processes should conclude with an evaluation to measure how effective the engagement plan was in achieving its objectives, and to capture the lessons learned during the project. Evaluating engagement processes will inform and improve future practice, engagement policy development and increase the department's evidence base. This will be beneficial to both the department and to our stakeholders.

To measure the effectiveness of the engagement strategy, evaluation should be considered at both the beginning and end of a project and progress should be monitored throughout. The nature of the evaluation will vary depending on the complexity and size of your engagement process. This is a key step and should not be excluded.

Advice on evaluating your engagement activity

The department's *Public participation framework* provides more detail on evaluation and continuous learning.

Advice on evaluation within the department is available on the evaluation and research support intranet page <https://intranet.dhhs.vic.gov.au/evaluation-and-research-support>. You can also contact the Centre for Evaluation and Research by email <CER@dhhs.vic.gov.au>.

The Stakeholder Engagement team is also available to provide general advice and support regarding the evaluation and monitoring of engagement activities. Contact the team by email <engagement@dhhs.vic.gov.au>.

Key questions

- What has worked well? What has been learnt?
- To what extent did the engagement process meet the engagement objectives?
- To what extent did the engagement process contribute to the overall project objectives?
- To what extent was the engagement process responsive to diverse communities?
- Were there any unexpected challenges?
- What could be done differently?
- Has it delivered the outcomes sought for participants? Are participants satisfied?

Template 7 will assist you to evaluate and implement learnings from your engagement activities.

Share

Along with evaluating your stakeholder engagement, it is important to share your learnings with the wider department. This will ensure others can learn from your experiences and the department and our staff are able to develop our engagement capabilities.

The Centre for Evaluation and Research operates the Evaluation and Research Knowledge Bank, a searchable database that provides space for staff to share their project evaluation and feedback. To share your learnings in the knowledge bank, contact the centre by email <CRE@dhhs.vic.gov.au>.

Barriers to effective stakeholder engagement

In developing this toolkit, the department has identified a number of common barriers to effective stakeholder engagement. It is important to understand these barriers before undertaking any engagement activities.

Unclear purpose

An unclear purpose for stakeholder engagement is one of the most commonly reported problems, especially from stakeholders. Both stakeholders and engagement staff need to properly understand why the process of engagement is occurring and what it hopes to achieve. This should be clearly established at the very beginning of engagement planning and consistently communicated to all parties throughout the engagement process. **See Step 1 on page 5.**

Failure to accommodate stakeholders' capacity

To ensure effective and inclusive engagement, it is important to recognise the diverse capacities, skills and resources of stakeholders. It is the responsibility of those planning and undertaking the engagement activities to ensure that they properly understand stakeholders' needs and capacities, and plan the methods of engagement accordingly. **See Steps 2-4 on pages 6 through 11.**

Insufficient skills or resources

The resources and skills available to your engagement project are likely to be limited. Therefore, it is important to develop your engagement plan with a realistic understanding of what is available to you.

Stakeholders frequently report that engagement activities often feel rushed or insubstantial, leading them to disengage from the process. This can lead to poor decision making and can damage longstanding relationships between the department and our stakeholders.

To ensure this doesn't happen, a full accounting of the resources available should be included in the development of your engagement plan. Understanding the resources available may also help to determine the level of participation appropriate for your project. **See Steps 3-4 on pages 8 through 11.**

Engagement activities can also be ineffective as a result of a lack of skills in cultural awareness and inclusive engagement. To ensure your engagement activities are culturally appropriate and inclusive, refer to the 'Inclusive engagement' section of the *Public participation framework*.

Non-inclusive engagement approaches

Inclusivity is a vital element of good stakeholder engagement, and your approaches and activities need to support this. Inclusive approaches should be included at all stages of your engagement, from planning to evaluation.

It is especially important that your engagement methods foster and actively encourage inclusivity. This means being culturally responsive and aware, being accessible to all peoples, allocating extra resources and time to those who need it, and being respectful of difference and diversity.

This also means using a variety of approaches and methods to engage your stakeholders. Just as the Victorian community is diverse, so too should be your methods of engagement.

For more information on inclusive engagement, please consult the *Public participation framework*.

Engagement fatigue

Engagement fatigue occurs when a group of stakeholders has been engaged in a way that has made them sceptical of the process and its aims. Often this happens when a group is engaged regularly but in a shallow or tokenistic way, leaving them shut out of the decision-making process. This is why it is critical to understand the history of stakeholder engagement in your particular area, the most appropriate level of participation for your project, and the purpose of your engagement plan. **See Steps 1-3 on page 7 through 9.**

It is also important to ensure adequate feedback is provided to your stakeholders to ensure they understand how their input has been used. **See Step 6 on page 13.**

Failure to provide feedback

A common feature of ineffective engagement is the failure to provide feedback on how stakeholder input has been used. This can lead to stakeholder fatigue and make engagement more difficult in the future.

Providing feedback to your stakeholders allows them to connect with the engagement process, building trust and strengthening relationships.

By providing feedback, we can strengthen the mandate of the department's work and create better outcomes for all Victorians. For a guide to providing feedback to stakeholders, **See Step 6 on page 13.**

Failure to evaluate

Another often overlooked aspect of stakeholder engagement is evaluation. Without proper evaluation it is difficult to know if our approach has been successful and how we can improve in the future.

Given the high volume of engagement activities undertaken by the department, we have a significant opportunity to develop a pool of skills, experience and knowledge in stakeholder engagement. This organisational capacity means we can continue to innovate and improve our engagement practices, leading to better outcomes for our stakeholders.

For guidance on evaluation and review, **see Step 7 on page 14.**

Contact us

Stakeholder Engagement Team, Communications and Media Branch

If you have any questions about this toolkit, please contact the Stakeholder Engagement team e: <engagement@dhhs.vic.gov.au>.

Other resources

The following toolkits identify and unpack a wide range of engagement tools and are useful resources for preparing for engagement.

- Participedia - Methods <http://participedia.net/en/browse/methods?f%255B0%255D=field_completeness%3A5&f%255B1%255D=field_completeness%3A4>
- South Australian government - Better Together engagement level selection tool:<http://bettertogether.sa.gov.au/engagement-selection-tool>
- DIY toolkit: provides tools to assist with every stage of engagement, from planning ahead, to implementing and evaluating. <http://diytoolkit.org/tools/>

Appendix A: Stakeholder engagement templates

Template 1: Purpose

What is the engagement purpose?	
What are the engagement objectives?	
What are the project objectives?	
Why do you need to engage?	
What is the scope of your engagement?	
What are the risks of engagement?	
What are the benefits for stakeholders?	
What engagement has already occurred?	
What are your negotiable and non-negotiable elements?	
What limitations will you need to consider, such time, resources?	
Do you have obligations to consider, such as- ethics, privacy, cultural responsiveness?	
Will your project require more than one stage of engagement? Will you engage different stakeholders using different methods?	

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Template 2a: Stakeholder identification

Who will be impacted by the project?	
Who has an interest in the project?	
Who are the project owners and partners?	
What is the project's authorising environment?	
What is the prior history of the engagement with your stakeholders?	
Who are the stakeholders who have been traditionally excluded from decision making?	
How can you ensure a diverse group of stakeholders?	
Who are the stakeholders that are critical to project delivery?	

Template 2b: Understanding your stakeholders

(Repeat for each stakeholder or stakeholder group)

Stakeholder	
Interest in the project	
Power to influence decision making	
Stakeholder capacity and limitations	
Appropriate methods of engagement	
Barriers to engagement	
Additional resources that may be required	
Key contacts	
Urgency of engagement	
History of engagement/ Nature of existing relationship	

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Template 3: Level of participation

Area	Explanation	Low	Med	High
Project complexity	**Mark the project complexity with an 'X' in the following columns:** **L:** There is only one real issue to be addressed **M:** There are more than 1 or 2 issues to be resolved **H:** There are a number of issues and it's unclear how to resolve them			
Potential impact on community	**Mark the potential impact on community with an 'X' in the following columns:** **L:** The impact on the community will be low **M:** The project will address a significant issue for the community **H:** The project will have a major impact on communities or the environments they live in			
Sensitivity to project	**Mark the sensitivity to project on community with an 'X' in the following columns:** **L:** The project is accepted and welcomed by the community **M:** Communities may wish to raise the profile of the project and there is some sensitivity to the outcomes of the project **H:** Community expectations about outcomes of the project vary significantly from those of decision makers and there is high sensitivity to the outcomes of the project			
Total level of engagement (show the total number for each column)				

How to use these ratings to identify the right level of engagement

Low	Med	High	Level of engagement
XXX			Inform/Consult
XX	X		Inform/Consult
X	XX		Consult
	XXX		Consult
	XX	X	Consult/Involve
	X	XX	Involve
		XXX	Involve/Collaborate/Empower
X	X	X	Involve/Collaborate/Empower

Template 4a: Develop plan

Project name	
Project owner	
Project timeframe	
Engagement purpose	
Overall engagement objectives	
Inclusive engagement plan	
Commitment to your stakeholder	
Engagement methods	
Roles and responsibilities	
Resources	
Ethical and privacy considerations	
Feedback plan	
Evaluation Plan	

Template 4b: Detailed engagement activity plan

(Repeat for each stakeholder or stakeholder group)

Stakeholder group	
Reason for engagement	
Timeframe for engagement	
Engagement methods	
Potential risks and important history	
Engagement channels / forums	
Key messages	
Feedback channels	
Delivery resources	
Costs/ budget	

Template 4c: Risk assessment

(Repeat for each identified risk)

Risk description	
Responsible officer	
Consequence	
Likelihood	
Priority	
Mitigation strategy	

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Template 5: Implement and monitor

(Repeat for each activity/task)

Activity/ task	
Responsible officer(s)	
Resources	
Timeframes	
Budget	
Key messages	
Unforeseen issues or difficulties?	
What input did stakeholder(s) have?	
What feedback will you provide?	
Progress notes	

Template 6: Feedback

(Repeat for each stakeholder or stakeholder group)

Stakeholder or stakeholder group	
Participation	
What input did your stakeholders have and how was it used?	
Appropriate method of feedback	
Stakeholder feedback provided	
Internal feedback provided	
Comments/Further Actions	

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Template 7: Evaluation

(Repeat for each activity/task)

Activity/ task	
Responsible officer	
Was the engagement task delivered on time? Why/why not?	
Was the engagement task delivered on budget? Why/why not?	
Was the task successful? Why/why not?	
How did you ensure your engagement was inclusive?	
What lessons were learnt/what would you do differently in future?	
How will you share your lessons with others?	
How will you ensure changes are made so your lessons are embedded in future engagement activities?	