

Engagement Planning and Self-Evaluation Template

2021

# Engagement Planning and Self-Evaluation Template

This template is for any service provider planning to carry out any type of engagement activity. It has been designed to help you plan, monitor, and evaluate your engagement activity.

Please return all completed templates to [Jennifer.faichney@falkirk.gov.uk](mailto:Jennifer.faichney@falkirk.gov.uk) for monitoring and reporting purposes.

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| **Available at:** | [www.falkirkhscp.org/publications/](http://www.falkirkhscp.org/publications/) |
| **Contact:** | [integration@falkirk.gov.uk](mailto:integration@falkirk.gov.uk) |

**Document information**

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**Contact details**

|  |  |
| --- | --- |
| Lead Name |  |
| Email Address |  |
| Phone Number |  |

**About the engagement activity**

|  |
| --- |
| What is the title of the engagement activity? |
|  |
| Is the engagement activity focused on a specific service area? If so, what service area? |
|  |
| Where will the engagement activity take place? |
|  |

## Step 1: Identify the issue

**What is objective of the engagement activity?**

|  |
| --- |
| What do we already know about the community and the issue? |
|  |
| What do we still need to know? |
|  |
| What are the **3** overarching messages or questions that you want to ask? |
|  |

## Step 2: Identify stakeholders who may be affected by the issue

**Who do you want to engage with?**

|  |
| --- |
| What is the target audience that you want to reach?  (This might be a particular group(s) of people, community, or general population) |
|  |
| Does the subject have an impact on any groups with protected characteristics?  (Age, gender reassignment, marriage & civil partnership, pregnancy & maternity, race, religion, belief, sex, sexual orientation) |
|  |
| What are the barriers to participation on where, when, or how activity takes place?  (This might include session timing, budget, i.e., cost of engagement, travel expenses, etc., participants have restricted mobility, participants live in care facilities, the need to provide respite support, childcare etc.) |
|  |

## Step 3: Plan the engagement

**Where does the engagement activity sit on the Public Participation Spectrum?**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Public Participation Goal** | **Inform**  To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions. | **Consult**  To obtain public feedback on analysis, alternatives and/or decisions. | **Involve**  To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered. | **Collaborate**  To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution. | **Empower**  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 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 look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible. | We will implement what you decide. |

**What outcomes are you looking for and what does success look like?**

|  |  |
| --- | --- |
| Outcomes (What are we trying to achieve?) | Indicators (What does success look like?) |
|  |  |

**What actions will be taken to meet the engagement outcomes?**

|  |  |  |
| --- | --- | --- |
| What | Who | When |
|  |  |  |

**What timescale does activity need to be completed within?**

|  |  |
| --- | --- |
| Start Date |  |
| End Date |  |
| Notice period for participants  *This should be at least 6 weeks for community organisations and at least 3 weeks for community members.* |  |
| Date results are required by |  |
| Other relevant dates/deadlines |  |

**What is your communications plan?**

Please contact the Partnership’s communication officer in advance of any communications activity or to discuss additional communications support, advice, and guidance.

Contact email: [HSCPComms@falkirk.gov.uk](mailto:HSCPComms@falkirk.gov.uk)

|  |
| --- |
| **Objectives**  Set out what the communications activity is intending to achieve. Start with the engagement aim and develop communications objectives that will deliver this. Keep your objectives SMART. |
|  |
| **Audience Insight**  Who are you trying to target? Outline your audiences and any insights you have on them. Are there any barriers that could prevent you from reaching them? |
|  |
| **Strategy**  Use your audience insight to set out the approach you will apply. You will also need to cover key messaging and the communications channels you will use. |
|  |
| **Implementation**  How will you deliver your communications and what tactics will you use? Develop a clear plan that allocates resources. Set out timescales for delivery. |
|  |
| **Scoring/Evaluation**  Focus on your outcomes. Were the outcomes met? Why or why not? |
|  |

**How will you provide feedback to participants?**

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| --- |
| How will the information gathered be analysed? Who will do the analysis? |
|  |
| How will feedback be presented? |
|  |
| When will you provide feedback to participants? |
|  |

## Step 4: Engage those potentially affected

**What actions have you taken so far and what issues have arisen?**

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| --- |
|  |

**Any other relevant information?**

|  |
| --- |
| E.g., Have you already started any activity, links to any reports or information relating to the activity? |

## Step 5: Evaluate engagement

**Describe how the review process was carried out?**

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| --- |
| Who was involved in the review? |
|  |
| Where and when did you meet to review? |
|  |
| What evidence was used to judge performance of the engagement? |
|  |

**Did the engagement activity achieve the intended outcomes?**

|  |
| --- |
| Comments: |

## Inclusion Standard

*We will identify and involve the people and organisations that are affected by the focus of the engagement.*

We will know we have met this Standard when:

* The people and groups who are affected by the focus of the engagement are involved at the earliest opportunity.
* Measures are taken to involve groups with protected characteristics and people who are excluded from participating due to disadvantage relating to social or economic factors.
* Participants in the community engagement process commit to continued two-way communication with the people they work with or represent.
* A wide range of opinions, including minority and opposing views, are valued in the engagement process.

**How well have you met the Inclusion Standard?**

|  |  |
| --- | --- |
| Excellent |  |
| Very Good |  |
| Good |  |
| Satisfactory |  |
| Weak |  |
| Unsatisfactory |  |

|  |
| --- |
| Comments: |

## Support Standard

*We will identify and overcome any potential barriers to participation.*

We will know we have met this Standard when:

* An assessment of support needs is carried out, involving all participants.
* Action is taken to remove or reduce any practical barriers which make it difficult for people to take part in engagement activities.
* Access to impartial and independent development support is provided for groups involved in the community engagement process.

**How well have you met the Support Standard?**

|  |  |
| --- | --- |
| Excellent |  |
| Very Good |  |
| Good |  |
| Satisfactory |  |
| Weak |  |
| Unsatisfactory |  |

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| --- |
| Comments: |

## Planning Standard

*There is a clear purpose for the engagement, which is based on a shared understanding of community needs and ambitions.*

We will know we have met this Standard when:

* Partners are involved at the start of the process in identifying and defining the focus that the engagement will explore.
* A clear and agreed engagement plan is in place.
* All available information which can affect the engagement process has been shared and used to develop the community engagement plan.
* Partners agree what the outcomes of the engagement process should be, what indicators will be used to measure success, and what evidence will be gathered.
* The timescales for the engagement process are realistic.
* There are sufficient resources to support an effective engagement process.

**How well have you met the Planning Standard?**

|  |  |
| --- | --- |
| Excellent |  |
| Very Good |  |
| Good |  |
| Satisfactory |  |
| Weak |  |
| Unsatisfactory |  |

|  |
| --- |
| Comments: |

## Working Together Standard

*We will work effectively together to achieve the aims of the engagement.*

We will know we have met this Standard when:

* The roles and responsibilities of everyone involved are clear and understood.
* Decision-making processes and procedures are agreed and followed.
* The methods of communication used during the engagement process meet the needs of all participants.
* Information that is important to the engagement process is accessible and shared in time for all participants to properly read and understand it.
* Communication between all participants is open, honest, and clear.
* The community engagement process is based on trust and mutual respect.
* Participants are supported to develop their skills and confidence during the engagement.

**How well have you met the Working Together Standard?**

|  |  |
| --- | --- |
| Excellent |  |
| Very Good |  |
| Good |  |
| Satisfactory |  |
| Weak |  |
| Unsatisfactory |  |

|  |
| --- |
| Comments: |

## Methods Standard

*We will use methods of engagement that are fit for purpose.*

We will know we have met this Standard when:

* The methods used are appropriate for the purpose of the engagement.
* The methods used are acceptable and accessible to participants.
* A variety of methods are used throughout the engagement to make sure that a wide range of voices is heard.
* Full use is made of creative methods which encourage maximum participation and effective dialogue.
* The methods used are evaluated and adapted, if necessary, in response to feedback from participants and partners.

**How well have you met the Methods Standard?**

|  |  |
| --- | --- |
| Excellent |  |
| Very Good |  |
| Good |  |
| Satisfactory |  |
| Weak |  |
| Unsatisfactory |  |

|  |
| --- |
| Comments: |

## Communication Standard

We will communicate clearly and regularly with the people, organisations and communities affected by the engagement.

We will know we have met this Standard when:

* Information on the community engagement process, and what has happened as a result, is clear and easy to access and understand.
* Information is made available in appropriate formats.
* Without breaking confidentiality, participants have access to all information that is relevant to the engagement.
* Systems are in place to make sure the views of the wider community continuously help to shape the engagement process.
* Feedback is a true representation of the range of views expressed during the engagement process.
* Feedback includes information on the engagement process, the options which have been considered, and the decisions and actions that have been agreed, and the reasons why.

**How well have you met the Communications Standard?**

|  |  |
| --- | --- |
| Excellent |  |
| Very Good |  |
| Good |  |
| Satisfactory |  |
| Weak |  |
| Unsatisfactory |  |

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| --- |
| Comments: |

## Impact Standard

*We will assess the impact of the engagement and use what we have learned to improve our future community engagement.*

We will know we have met this Standard when:

* The outcomes the engagement process intended to achieve are met.
* Decisions which are taken reflect the views of participants in the community engagement process.
* Local outcomes, or services, are improved as result of the engagement process.
* Participants have improved skills, confidence, and ability to take part in community engagement in the future.
* Partners are involved in monitoring and reviewing the quality of the engagement process and what has happened as a result.
* Feedback is provided to the wider community on how the engagement process has influenced decisions and what has changed as a result.
* Learning and evaluation helps to shape future community engagement processes.

**How well have you met the Communications Standard?**

|  |  |
| --- | --- |
| Excellent |  |
| Very Good |  |
| Good |  |
| Satisfactory |  |
| Weak |  |
| Unsatisfactory |  |

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| --- |
| Comments: |

**Overall, how well have you met the National Standards for Community Engagement?**

|  |  |
| --- | --- |
| Excellent |  |
| Very Good |  |
| Good |  |
| Satisfactory |  |
| Weak |  |
| Unsatisfactory |  |

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| --- |
| Comments: |

## Step 6: Decision-making

**How will this engagement activity have an impact on decision making?**

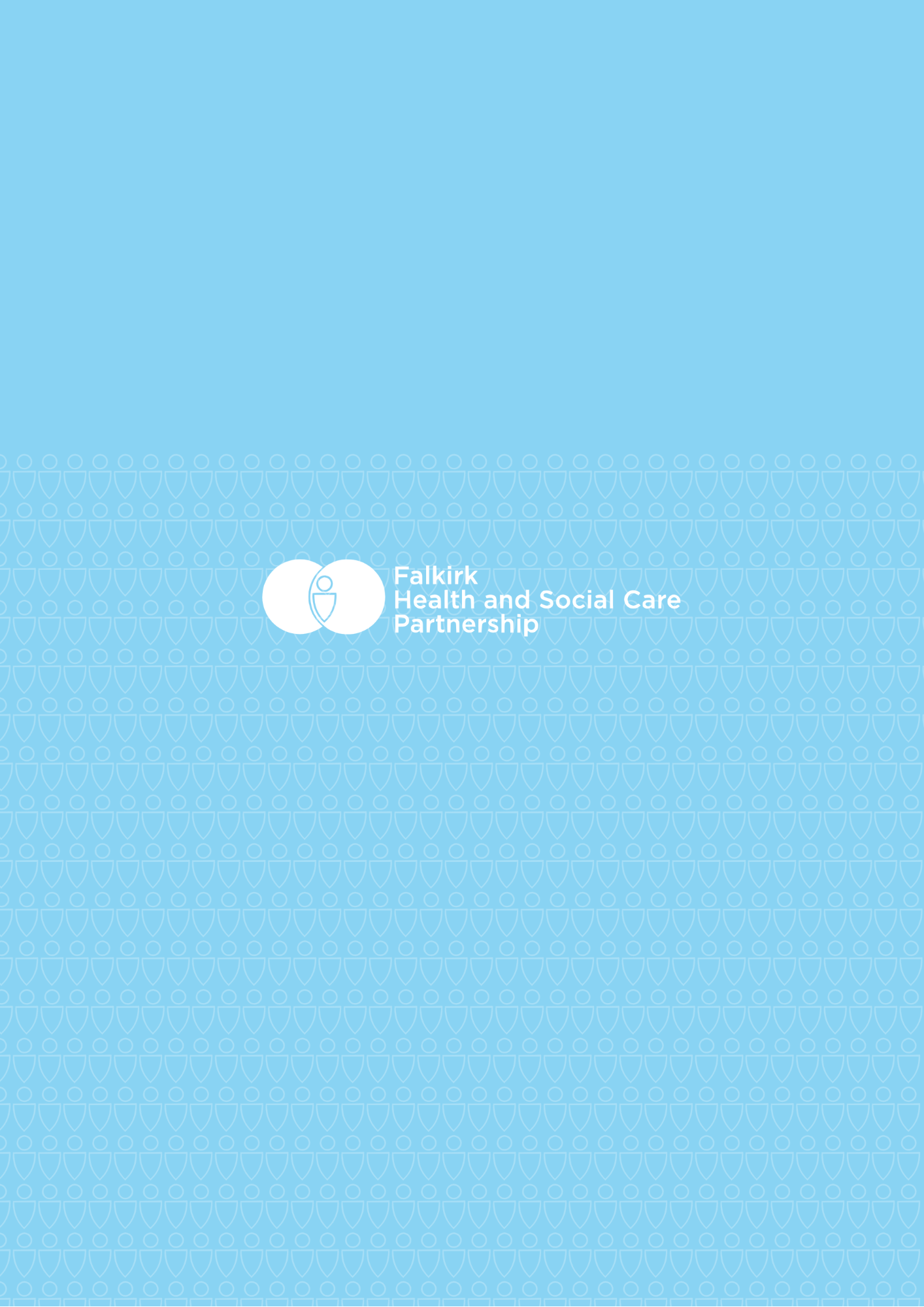
|  |
| --- |
| What key lessons have been learned because of the engagement? |
|  |
| Have the outcomes of the engagement impacted on the change or design of a service? If so, how? |
|  |
| What will we do next? |
|  |

## Step 7: Feedback

Did participants of the engagement activity receive feedback?

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| --- |
| Comments: |

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