



Resident and Community Engagement for Retirement Village Redevelopments

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About the author



BBS Communications Group is an award-winning, independent consultancy operating across Australia and the Asia-Pacific region for more than 30 years.

Our team of expert communicators, journalists and copywriters is augmented by specialists in stakeholder engagement, organisational change management and risk management.

We focus on what we are very good at – crafting and telling our clients’ stories to help them build business and community relationships which underpin enduring and profitable organisations.

BBS’ growth has come with the increasing recognition by businesses of all sizes and across all economic sectors, that corporate reputation management and high-quality client and stakeholder communications are matters of critical importance to profitability and longevity.

With extensive experience in the broader property sector and the retirement living sector more specifically, BBS actively supports clients in the sector through media and PR, strategic communications, issues management, and community engagement.

Our team has partnered with the Retirement Living Council on a number of key projects in recent years, including the creation and launch of the Book of Wise Moves, the Retirement Living Code of Conduct, the Guide to Political Engagement for the 2022 Federal Election and these guidelines for Resident and Community Engagement for Retirement Village Redevelopments.

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EXECUTIVE SUMMARY

More than 200,000 Australians now live in retirement villages, with that number expected to grow significantly over the next decade...and beyond.

At the same time, the average age of retirement villages in Australia is approaching 25 years, leaving village operators facing the possibility of renovation or wider redevelopment to meet increased demand but also the needs of a changing market.

The Retirement Living Council, a division of the Property Council of Australia, has partnered with BBS Communications Group to develop this guide to provide operators with the best engagement guidance to ensure resident and community engagement around redevelopments is meaningful, genuine and reflects the principles and core values of IAP2 – generally recognised as global best practice in stakeholder engagement.

Retirement Living Council members reflect village operators of all kinds and sizes. We recognise that there is not currently a set standard for resident and community engagement, meaning that operators have had to determine the best process for themselves. For operators with limited or no resourcing or capability in stakeholder engagement this can be challenging and create additional risks.

This publication has been developed in consultation and engagement with representatives from both retirement living operators and resident committees, considering the challenges and concerns of stakeholders during similar redevelopment projects, and looks to provide guidance and consistency in how we as an industry can approach these projects.

Redevelopments may ultimately bring great benefit for existing village residents, but it can also bring a period of great change and upheaval at a time where life should be something to be enjoyed.

How operators engage with residents through this process is critical to creating an environment for mutual success – where the community can be successfully redeveloped and meet the needs of residents well into the future, while existing residents feel consulted and valued, and where care is taken to minimise the impact to everyday community life.

Ben Myers
Executive Director – Retirement Living Council
Property Council of Australia

INTRODUCTION

The Retirement Living Council (RLC), in conjunction with BBS Communications Group (BBS) have developed the *Resident and Community Engagement for Retirement Village Redevelopments* to assist retirement living operators to engage with their residents when undertaking a redevelopment of their retirement village.

The guidelines are based on the values and principles of the International Association for Public Participation (IAP2) and the Retirement Living [Code of Conduct](#) which promotes and protects the independence, privacy, happiness, safety, and security of retirement living residents.

There is an important difference between informing residents about what you are proposing, and empowering residents to play an integral role in the decision-making process. These guidelines are designed to arm operators with the best engagement strategies to ensure the resident engagement process is meaningful, genuine, and efficient.

Why is guidance needed?

There is a growing need for operators to consider redevelopment of existing communities. With the average age of Australian retirement village approaching 25 years, combined with land supply and cost issues, it is expected that there will be an increasing number of village redevelopments in coming years.

As more villages require updates ranging from minor upgrades to major redevelopment, many current residents will face disruption to their daily lives at a time in their lives where they want to feel settled, relaxed, and secure. As a result, **small changes can have significant impact.**

To date, operators pursuing major changes to a village have had to determine for themselves the best process for engaging and communicating with residents and other key stakeholders. While some operators have navigated this relatively successfully, other operators have encountered significant challenges.

With redevelopments contingent on resident support and approval, **good engagement is critical.** This is not only simply to see a redevelopment proceed but also to ensure that, on completion, operators have a community that is not only financially viable and meets future market needs but has maintained positive relationships with its existing residents.

Engaging authentically and effectively with residents also helps retirement community operators to abide by the Retirement Living Code of Conduct (the Code) and uphold its vision to promote and protect the independence, privacy, dignity, happiness, safety, and security of older people.

When dealing with current, potential, and future residents, and relevant stakeholders, the Code supports:

- Acting with integrity
- Acting professionally
- Maintaining regulatory compliance
- Being fair and reasonable

- Striving for clarity
- Being transparent and accountable
- Respecting the dignity of residents and stakeholders.

The Code provides that retirement community operators should take steps to ensure there is consultation with residents in relation to any proposed action or change that could have a significant impact on the residents' financial affairs, the amenity of the community, or their way of life.

What this guidance aims to deliver

Recognising that operators come in a variety of types and sizes, not all operators will have engagement expertise on hand within their organisation. This guidance seeks to recommend best practice for operators of all sizes – whether they have existing specialist resources, will be engaging external advice, or undertaking engagement activities within existing resources.

The intent is not to prescribe rigid rules that all operators must follow,
as this may not be practical or viable for all operators.

Much like that Aussie classic The Castle – it's the 'vibe'. The intent is to apply best practice to equip operators for engagement and to create some consistency in the 'spirit' in which they engage with key stakeholders during community redevelopment projects.

What is best practice engagement?

The IAP2 approach to stakeholder engagement is generally accepted as best practice worldwide and is what informs the recommendations and guidance outlined in this document.

IAP2 has developed core values for use in the development and implementation of public participation (i.e. engagement) processes, namely:

1. Public participation is based on the belief that those who are affected by a decision have a right to be involved in the decision-making process.
2. Public participation includes the promise that the public's contribution will influence the decision.
3. Public participation promotes sustainable decisions by recognising and communicating the needs and interests of all participants, including decision makers.
4. Public participation seeks out and facilitates the involvement of those potentially affected by or interested in a decision.
5. Public participation seeks input from participants in designing how they participate.
6. Public participation provides participants with the information they need to participate in a meaningful way.
7. Public participation communicates to participants how their input affected the decision.

The IAP2 spectrum

As part of engagement activities, it can be helpful to identify and classify your audiences. The IAP2 spectrum was developed to assist in this.



There is no one place to be on the spectrum that's better or more important than others – it will depend on your project, its objectives, duration and complexity, and the number and types of stakeholder audiences that may be impacted by it.

A person or group's classification or place on the spectrum relates to who needs to know what, how much they need to know, and how much active input and participation needs to be sought from these respective groups.

This is further explained under *Levels of Engagement* on pages 23-24.

For more information on IAP2 visit <https://iap2.org.au/>

WHY DO WE NEED ENGAGEMENT?

Simply put – engagement can help to build better relationships, greater understanding and strengthen communities.

Whether during new development or a redevelopment, village operators will engage with hundreds of people – residents, prospective residents, family members and friends, special interest groups and members of the broader community.

Each of these people have a vested interest in what we are doing and all of them – in one way or another – are connected to our collective purpose as an industry to deliver age-friendly communities that support the best social, economic and health outcomes for residents.

In the case of redevelopment projects specifically, good engagement can be critically important in smoothing a path to resident support. With some jurisdictions requiring a majority vote in support of redevelopment from residents before it can proceed, engagement may mean the difference between the project stalling at the starting line or proceeding relatively unhindered.

Beyond this, any proposed redevelopment has the potential to create disturbance, upheaval and stress for residents while the works are underway. Existing residents – even those who welcome the change – will still want to live relatively untroubled by the inconveniences of site works, restricted access, or relocation to a new home.

Good engagement ensures open and transparent communication throughout and helps residents to:

- Feel the operator is working with them and that everyone ultimately just wants a community where people want to live
- Feel valued by the village operator, and consulted and informed about what is happening
- Understand the rationale for the development – even if they don't agree
- Trust that the operator is acting in their best interest
- Feel listened to and that their individual circumstances matter.

Good engagement helps to build and maintain trust with residents, with families and with the broader community. Through this, it doesn't just smooth the path for the proposed redevelopment – it can enhance an operator's brand reputation and social licence to operate.

COMMON RESIDENT CONCERNS

In the preparation of this guidance, representatives of both village operators and residents were consulted on their previous experiences with redevelopment projects – both positive and those less successful.

Several themes emerged in relation to common resident concerns which, through discussion with participants were further refined to three main areas. This is not an exhaustive list but provides an insight into the main drivers and 'pain points' for residents through this process.

These are areas identified as having the potential to have the greatest impact on the success (or otherwise) of redevelopments, and without effective engagement could become significant barriers to success.



Theme	Development <i>Practical impacts of the development on day-to-day life</i>	Finance <i>Financial and contractual impacts</i>	Home Life <i>How the resident's home life may be impacted during and after</i>
Common Questions/Concerns	<ul style="list-style-type: none"> • What's happening and when? • Dust, noise, traffic • Do we get a say and what does that look like? • Impact on open space and amenities • What are the development timeframes? • How will you mitigate construction noise? • Will it impact visitors/visitor parking? • What are the development benefits (e.g., new pool, more parking etc) and how and when can I access them? • Will it impact on surrounding open space? 	<ul style="list-style-type: none"> • Additional costs, fees – will I be worse off or will the operator supplement? • What will it mean for the value of my home? • Will I have to bear any costs associated with moving into the new development? • Will I have to bear any costs associated with exiting my contract if I don't want to move into the new development? 	<ul style="list-style-type: none"> • Where will I live? • What if I don't want to move? • What will my new home offer me that I don't already have? • What help will I have? • Where will I be housed through the development process? • If I don't want to move into the new development, what are my options? • Will I be moved away from my friends/neighbours? • How will the resident community be engaged through the consultation process?

COMMUNITY CONCERNS

We also looked at common concerns of the broader community who live nearby to villages undergoing redevelopment. Generally, these concerns were mostly consistent with those occurring with any construction or development project in your local neighbourhood, such as noise, dust, views, traffic/parking. There weren't additional issues identified that were specific or unique to retirement village redevelopments.



Theme	Development	Infrastructure
<p>Example Concerns</p>	<ul style="list-style-type: none"> • What's happening and when? • Dust, noise, traffic • Impact on open space and amenities • What are the development timeframes? • How will you mitigate construction noise? • Will it impact visitors/visitor parking? • Height/scale of development concerns • Impact on views and open space • How will the development stay in character with surrounding landscape? 	<ul style="list-style-type: none"> • Increase density means more traffic on the roads • Increase of traffic makes the community unsafe for children • Car parking requirements • What will it offer (amenities, services etc) to the broader community?

These are valid concerns that will need to be managed – particularly to mitigate any opposition to DA applications – but compared with the more individualised and sometimes sensitive needs of residents, community engagement should be a more straightforward process.

Benefits of redevelopment

It is important to understand that some residents will have different perceptions of selling points and operator redevelopment.

There will be people who are perfectly happy with how things are and won't see a need for change at all. We have had to apply a more generalist approach for the purposes of this project, but as part of the upcoming themes, have addressed the critical need to consider the individual in this process.

The consensus was that benefits are better considered and articulated by the following priority order:

- What's in it for me
- What's in it for the community (e.g. community life, amenity etc)
- What's in it for everyone else (e.g. operator, staff, general public)



Theme	Development <i>General benefits that the redevelopment will deliver for key stakeholders</i>	Home <i>How home life will be improved or enhanced by the redevelopment</i>	Community Life <i>How the community will be enhanced by the redevelopment</i>
Benefits	<ul style="list-style-type: none"> • Improved accommodation, equipment, technology, amenities, and services • Greater accessibility (meets accessible housing standards) • More care options • Improved connection to open space • Increased supply to meet need • Increased/improved parking for residents and visitors • Improved connectivity with local area (e.g. roads, public transport) 	<ul style="list-style-type: none"> • More diverse housing options (e.g. number of bedrooms, levels of care, apartment options) • More adaptable to meeting resident needs over time 	<ul style="list-style-type: none"> • Improved communal areas • Improved connectivity with other residents • Improved/additional services

VALUES UNDERPINNING RESIDENT AND COMMUNITY ENGAGEMENT

Through consultation with operators and resident representatives some common themes emerged as critical to success. They reflect the learnings and recommendations of operators or residents who have successfully – and unsuccessfully – been involved with previous redevelopment projects.

These themes reflect the general spirit that should underpin all engagement activities. They are the values that operators should strive to uphold in their engagement with all key stakeholders.

Genuine need

The redevelopment solves a legitimate problem. If the development meets a genuine need, it makes articulating the ‘why’ to residents and other stakeholders easier.

Early and often

Engagement should begin as early as practicable and be regular throughout, to bring residents along on the journey, maximise the chances of ‘winning hearts and minds’ and minimising issues, delays, detractors and disruptions.

Honesty and empathy

Being open and honest in what we say and listening and responding to resident feedback and concerns with empathy and understanding will be critical to build trust and support for the project.

Shared understanding

The development will need to deliver certain business benefits for the operator as well as clear lifestyle benefits for residents but ultimately, the end goal for is the same for everyone – a home, a village, and a community where people want to live.

Recognise the individual

The impact will differ from resident to resident. It is important to remember to engage with the individual as much as the residents as a group. The needs, concerns and personal circumstances will vary from one resident to the next.

TRANSLATING VALUES TO FEELINGS

One of the unique differences with redevelopments in retirement villages is of course the residents themselves.

Whatever the project looks like, you are proposing it takes place around people who are at a stage in their life where, let's face it, they want to enjoy their retirement in relative peace and quiet. They are also likely to be mostly long-term residents who have settled into a routine that works for them.

It's a big change you are proposing with the potential for significant upheaval and inconvenience – and that can generate a lot of uncertainty, fear and confusion.

How residents feel throughout this process can not only impact the redevelopment itself but the ongoing relationship between the residents and the operator/staff.

Ensuring your resident and community engagement aligns with the values previously outlined should engender the following feelings among residents and other key stakeholders.

Genuine need

Residents and stakeholders feel that they understand why the redevelopment needs to take place, the problem/s it will solve and the benefits that it will deliver for them and the community as a whole – whether they ultimately agree or not.

Early and often

Residents and stakeholders feel valued by the operator, involved in the process, and consulted and informed about what is happening at every stage through the process.

Honesty and empathy

Residents and stakeholders trust the information being shared with them, trust that the operator is taking their concerns into consideration and has their best interests in mind.

Residents feel able to share their thoughts and concerns and feel that they will be respected, listened to, and considered.

Shared understanding

Residents and stakeholders feel that everyone is working together for a shared overall goal, even if the day-to-day reality may ultimately look slightly different for everyone. Residents feel that the operator is working in partnership with the community to deliver the best outcome for current and future residents.

Recognise the individual

Residents feel that their unique circumstances matter, not matter how small the issue might be. They feel these issues are taken into consideration and that they can have a conversation with the operator about their individual requirements and issues will be addressed and resolved in confidence.

COMMON CHALLENGES

A number of common challenges emerged from discussions with those who have previous experience of redevelopments. Some may seem obvious, but they are all important considerations in your engagement planning.

Residents may see no need for redevelopment

As beneficial as an operator may feel that redevelopment is – financially and for residents – your residents may simply be happy right now and don't want the hassle of change.

Residents may see the need before you do

Conversely, if there are critical issues relating to things like safety or care that can significantly impact daily life, there is a strong chance the residents already see what needs fixing and are wondering what's taken you so long to do something about it.

Fear of change is real

A common refrain was the fear or hesitancy to change things, particularly a fear of moving or being temporarily 'homeless' – even if just relocating for a short time. Uncertainty, questions and lack of information will feed that fear, which is why early, and regular communication is important.

Change = expensive

For many residents, finances are fixed and whether the perception is correct or not, the perception remains that shiny and new means more expensive.

Change is immediate

There is a common misconception that once redevelopment is mentioned, things will happen quickly – particularly negative things like construction noise. This is partly what contributes to the fear. It is important to communicate early but also to communicate that the road to redevelopment can be a long one, and you've only just started on the journey.

Little things can become big things

As people navigate any change process, they look for things that are familiar or certain – things they feel they can control. Residents may raise issues that may be outside the scope of the redevelopment. They may seem unimportant or innocuous, but if not handled well to provide that surety for residents, they could become massive points of resistance.

Us vs Them

As redevelopment is about ensuring the community continues to appeal to potential residents, it is not uncommon for a sense of 'us vs them' to develop. Existing residents may view new residents as 'not like us' or 'not our type of people'. For example, financially better off as they can afford a luxe new apartment.

Not necessarily a correct assumption – or a fair one – but one that needs to be managed to ensure that existing residents continue to feel they belong in the new-look community, and they are welcoming to any new neighbours.

WIIFM is #1

This is a process involving people so ‘What’s in it for me?’ (or ‘How will this impact me?’) will be the primary driver. For example, residents may be concerned that a redevelopment involving more homes, once completed, may bring increased traffic to the area.

TIPS AND LEARNINGS

Here are a just few tips from those who have been there before...

Open with a conversation, not a decision

A soft introduction of the idea of redevelopment can be more effective. Rather than announcing redevelopment plans, have a conversation that brings the residents in from the start. Consider something along the lines of ...

“We’ve had a few thoughts about the community and what you might like – we’d like to share these with you and see what you think...”

Consider the messenger

It is important to have the right person communicating with key stakeholders. This might mean different ‘messengers’ for different information. Your CEO might be ideal to address a wider community meeting or media, but conversations with residents about specific personal circumstances may be better tackled by staff they know well, who have built trust.

If you plan to use external consultants for stakeholder engagement, consider what role they will play. Do you make them an extension of your everyday team or keep them working in the background with your internal team taking on the face-to-face conversations?

Where can you put decisions in the residents’ hands?

The reality is that most decisions will be the operators to make. To include residents as part of the process look for areas that residents can contribute tangibly to a decision.

For example, if you are building or updating a communal space, ask residents to ‘test drive’ the furniture and provide feedback. Contemporary design may look great but it’s not always practical – or comfortable – for someone in their 70s or 80s. Co-designing the space allows residents to see and feel their input daily – and helps to connect them to the new space.

Little things done right make a big difference

If a resident is relocating, arrange for someone to pack for their move to their new home. Organise the reconnection of utilities or redirect their post. Help dispose of things they don’t want to take with them to the new home. And if they are relocating temporarily during the site works, move them to a unit with the same layout so it’s easier for them adjust and navigate the space.

However much time you think you will need – double it!

Given the primary stakeholder in this situation is residents, additional time and attention will be required. While resident meetings and letterbox drops will provide ‘updates’ this group will generally respond better to high-touch engagement – regular (ie weekly or even daily) face to face and individual engagement.

This is partly to do with the communication preferences of this group, but also the fact that they will be navigating a change process – one which will generate additional concerns and stress. They may seek and require regular reassurance, so you need to make time to provide it.

Integration with sales and marketing is critical

Part of any redevelopment is the future of the community – long after current residents have left. This means that sales and marketing for new homes may be underway at the same time as the redevelopment itself.

It is essential that all three elements – engagement, sales and marketing – work together in order to maximise success.

It will be critical throughout engagement – whether with existing residents, families, prospective residents or broader community – to ensure that:

- there are no conflicting messages that may lead to confusion among audiences, or distrust of what is being communicated
- sales or marketing campaigns are not timed to go to market at critically sensitive times in resident communication/engagement
- critical information is not being communicated to the market before existing residents.

Treat a relocation like a new buy

Much as you would for new residents, treat the moves of existing residents like a new buy. Provide a welcome pack, have someone help them find everything in the new home – and available to assist for a little while as they find their feet. Additionally, if you are opening display accommodation for new residents, give existing residents a sneak peek first!

Start with a blanket offer and negotiate from there

Conversations will eventually get to the nitty gritty of individual circumstances. To respect individual circumstances, start with a blanket offer for all residents – your ‘starting point’ for everyone that you are comfortable with. From there, any residents who wish to can discuss individual circumstances or needs with the operator confidentially.

Consider a budget for legals for residents to seek their own advice

As a goodwill gesture, consider including a defined amount in your redevelopment budget for the resident committee to put towards getting independent legal advice on behalf of residents.

Social events are central to bridging gaps

To help smooth any feelings of ‘us vs them’, social events can help to bring the community together. Similarly regular coffee chats with the project team, or Friday drinks to catch up on progress can all help residents to feel informed, comfortable in the new spaces and get to know their new neighbours at the same time.

DEVELOPING AN ENGAGEMENT PLAN

This good practice model for stakeholder engagement has been adapted from the international standard developed by the Institute of Social and Ethical Account Ability (2005).

The four-step process is designed to support retirement living operators to plan and develop effective stakeholder engagement plans.



Plan

Develop an understanding of the purpose of your activities and how these relate to the business and project objectives, with consideration for stakeholders. Map these stakeholders and their level of impact or influence. Identify any known or potential issues and think about how these can be mitigated or minimised, and which communication tools will be most effective in achieving this.

Prepare

Map any known or perceived stakeholder or project related issues or risks during the planning stages of engagement. An issues management register is a good way to log stakeholder concerns and complaints and ensure enquires are responded to within agreed timeframes.

You can categorise concerns and complaints by labelling them minor, moderate, and major. You should also develop a list of protocols depending on their impacts.

Engage

Identify the most appropriate tools and techniques to engage stakeholders and design an approach that suits the needs of your specific project and helps you achieve overarching objectives.

A tailored, more personal engagement plan will help accommodate and encourage a wide range of participants. Key communication messages relevant to the specific project should also be developed as part of your engagement plan and be used to guide every communication activity.

During implementation phase, remain aware of your stakeholders needs. Regularly review the effectiveness of your chosen communication tools and methods to ensure they are achieving the desired result and enabling meaningful participation from all stakeholders.

Evaluate

Make sure your stakeholders understand the engagement process (e.g. when and how they will be consulted and timeframes for providing feedback). Regularly review the effectiveness of your chosen communication tools and methods to ensure they are achieving the desired result.

After your engagement activities are complete, it's also important to provide meaningful feedback to your stakeholders about how their input has been used to influence decisions and outcomes.

*If you need additional assistance, the **Engagement Toolkit** in the Appendix contains more detail about planning your stakeholder engagement.*

LEVELS OF ENGAGEMENT

Every project will require a different level of engagement, and supporting tools and techniques to facilitate the engagement, depending on the perceived or actual impact on the identified stakeholders. You may also choose to use different engagement methods at various stages of your project, depending on the outcomes you are hoping to achieve.

The following table provides guidance on the various levels of engagement according to IAP2 and suggests ways you can engage stakeholders according to each level of engagement.

The table reflects the IAP2 spectrum previously mentioned on page 8.

	Inform	Consult	Involve	Collaborate	Empower
Our goal	Communicate with stakeholders so they have the information they need, when they need it.	Listen to our stakeholders and use their feedback to inform decisions.	Work directly with our stakeholders to ensure their needs and concerns are understood and considered.	Partner with our stakeholders to achieve the best solutions and shared goals.	Support stakeholders to make their own decisions and achieve outcomes.
Our promise	We will keep you informed and provide you with accurate, timely and relevant information.	We will make sure you have the opportunity to have your say on matters that have an impact on you.	We will work with you to ensure your concerns and issues are understood and considered and provide feedback on how your input influenced the outcome.	We will work together to deliver outcomes that achieve our shared goals and incorporate your advice and recommendations into the outcomes as much as we can.	We will support you to implement your actions and enable you to contribute to achieving our shared outcomes.
Methods of engagement	<ul style="list-style-type: none"> • Newsletters • Personalised letters/info packs • Fact sheets • Social media • Media releases and advertising • Sneak peek/tours • Corporate documents • Project hotline • Dedicated project email • Website 	<ul style="list-style-type: none"> • Public consultation • Surveys • Stakeholder forums • Focus groups • 'Town hall' meetings • Social functions 	<ul style="list-style-type: none"> • Community sessions • Advisory panels • Workshops • Participatory decision-making processes • Consultative committees 	<ul style="list-style-type: none"> • Reference groups • Partnerships • Multi-stakeholder initiatives 	<ul style="list-style-type: none"> • Integrate stakeholders into governance structure (e.g. As members of resident committee, body corporate etc)
Decision maker	Village operator	Village operator	Village operator	Village operator and stakeholders	Stakeholders

For some projects where there is minimum disruption to stakeholders, it may be determined that engagement simply means ensuring stakeholders are well informed about the processes and outcomes. However, for projects that may have a higher impact, this approach shows how we may seek direct stakeholder input. The level of approach applied should be determined by the purpose of the engagement, our role and responsibilities and the issues being considered.

*A community and stakeholder engagement framework process chart, which details how to determine the level of engagement that should be used, is available in the **Engagement Toolkit**.*

COMMUNICATION METHODS, TOOLS AND TECHNIQUES

Operators will need to employ different strategies to manage community engagement activities effectively and proactively, depending on the nature of the issue. These include techniques for information sharing, for seeking feedback and techniques for closing the loop.

The below table provides some examples of engagement and communication tools for redevelopment where a DA is required, including example timing for implementation. This is not an exhaustive list but outlines some common tools that could suit this particular audience.

Engagement approaches should always be tailored to meet the needs of each individual retirement village and the communities they represent.

Tools	Description	Example timing
Resident meetings with operators/project team	Resident meetings with project team to discuss strategy and upcoming milestones	Before DA lodgement & throughout process*
Courtesy letters	Courtesy letters to residents and community	Before DA lodgement
Email/ phone hotline	Dedicated information phone line and project email for residents to contact engagement team.	Before DA lodgement
Website	Project website providing project background information, construction updates, FAQs, and feedback info etc	Before DA lodgement
Stakeholder register	Document used to capture contact details of stakeholders and issues raised as they are obtained	Before DA lodgement
Q&As	A confidential document (used by project spokespeople, front line staff, other engagement team members) that provides detailed answers to address potentially contentious issues	Before DA lodgement
Key messages	A suite of messages developed to support the marketing, communications, and stakeholder engagement for the project to ensure messaging is aligned	Before DA lodgement
Processes, protocols and procedures	A set of stakeholder engagement, media and communication processes, protocols and procedures to ensure communication to stakeholders is clear and consistent	Before DA lodgement
Resident notifications	Letters or flyers notifying residents and broader community of DA lodgement and DA approval	As required throughout

Tools	Description	Example timing
	and potential impacts once construction commences	
Meetings and briefings	One on one meetings with residents to provide detailed information about the project and to ensure support	As required throughout
Fact sheet	A fact sheet to be developed providing a project overview	During DA review
Holding statement	General statement developed and preapproved for use in the instance of media enquiry on the project before DA approval	During DA review
FAQs	A document (available online or in hard copy) that provides key messages and basic project information in question-and-answer format	During DA review
Information session	An informal setting with displays for participants to view information on set topics and to ask questions of project representatives	After DA approval
Social media	Share relevant project information from notifications, construction updates and media announcements through established social media channels	After DA approval
Media releases	Approved public statements announcing project milestones and achievements to gain editorial coverage	As required throughout
Coffee carts/catch-ups	When major works that could disturb residents are announced, a coffee cart/morning tea catchup provides an informal and friendly opportunity for residents to grab a coffee and to talk directly to project representatives about work underway.	After DA approval
Site signage	Site signage is used to identify the project, provide contact details or present directional/educational information	After DA approval

*In keeping with the values underpinning your engagement, the earlier you can engage in discussion with residents the better. If appropriate, considering testing the water with informal conversations prior to even starting to draw up plans for a DA submission.

*A fuller list of communication tools and techniques can be found in the **Engagement Toolkit**.*

REPORTING AND CONTINUAL IMPROVEMENT

Regardless of project size or stakeholder impact, reporting on stakeholder and community relations activities should be ongoing and consistent throughout the duration of the project. The type and regularity of reporting will vary depending on the size of the project, the operator and the stakeholder groups but can include items such as monthly reporting, annual reporting, issues management, key performance indicators and a final evaluation report.

LEGISLATIVE REQUIREMENTS FOR VILLAGE REDEVELOPMENT

Depending on the location of the proposed redevelopment, operators will need to consider any local or state government requirements in relation to development generally. However, in some states there are also additional requirements or legislation affecting retirement village redevelopment projects more specifically.

Russell Kennedy Lawyers has provided a brief overview of these requirements, outlined below:

Jurisdiction	Requirements	Time period
ACT	<ul style="list-style-type: none"> • The operator has given the resident at least 12 months written notice of the operators' intention to apply to the Tribunal for the order (to end a residence contract on grounds of upgrade or change of use); and • Development approval has been obtained • The operator has obtained (or made available) for the resident alternative accommodation of approximately the same standard with no greater financial outlay on part of the resident than the current resident contract, and is acceptable to the resident or reasonably ought to be acceptable to the resident 	Minimum 12 months' notice before ending a residence contract on grounds of upgrade or change of use
NSW	<ul style="list-style-type: none"> • The operator has given the resident at least 12 months written notice of the operators' intention to apply to the Tribunal for the order (to end a residence contract on grounds of upgrade or change of use); and • Development approval has been obtained • The operator has obtained (or made available) for the resident alternative accommodation of approximately the same standard with no greater financial outlay on part of the resident than the current resident contract, and is acceptable to the resident or reasonably ought to be acceptable to the resident 	Minimum 12 months' notice before ending a residence contract on grounds of upgrade or change of use

Jurisdiction	Requirements	Time period
SA	<ul style="list-style-type: none"> • Every residence contract must have a term in the contract that requires the RV operator to convene a meeting of residents, before any redevelopment is commenced, to: <ul style="list-style-type: none"> ○ Present a plan of, and a report on, the proposed development; and ○ Answer any reasonable questions put by a resident • The meeting is convened by sending to each of the residents, at least 10 days prior to the meeting, a written notice setting out: <ul style="list-style-type: none"> ○ Time and place of the meeting ○ The reason for the meeting • Redevelopment cannot not take place, unless the RV operator has given due consideration to a resident's rights arising from the resident contract, and reasonable arrangements have been put in place regarding alternative accommodation if required. 	
Qld	<ul style="list-style-type: none"> • The RV operator must give each resident of the RV a proposed redevelopment plan and a notice (a residents meeting notice) in the approved form that states – <ul style="list-style-type: none"> ○ If the proposed redevelopment plan is not approved within a stated reasonable period not less than 21 days after the giving of residents meeting notice, the RV operator may apply to the Chief Executive for approval of the proposed redevelopment plan and ○ If the proposed redevelopment plan is approved, a resident may apply to the Tribunal for a review of the decision 	
TAS	No requirements in relation to redevelopment of a village	
VIC	No requirements in relation to redevelopment of a village	
WA	No requirements in relation to redevelopment of a village	

TEMPLATES

- Clarify purpose and objectives
- Identifying your stakeholders
- Engagement activity plan
- Monitoring your engagement
- Stakeholder enquiry form
- Review and measure engagement activities

*Examples of these templates are available in the separate **Engagement toolkit**.*

ADDITIONAL INFORMATION AND RESOURCES

Western Australia

[Planning Engagement Toolkit for Western Australia](#) (currently in draft form)

South Australia

[Community Engagement Charter, April 2018, Department of Planning, Transport and Infrastructure](#)

VIC

[Co-design – Community Engagement](#)

TAS

[Tasmanian Government Framework for Community Engagement](#)

NSW

[Community Engagement Strategy](#)

Queensland

[Brisbane City Council Community Engagement Policy](#) (example)

APPENDIX: STAKEHOLDER ENGAGEMENT TOOLKIT

Introduction

Engagement is an inclusive process to ensure all stakeholders have the opportunity to participate and have their voices heard. How we engage and the quality of our interactions determines not only how successfully we deliver the project, but how successfully we deliver on our commitment to the Retirement Living Code of Conduct to promote and protect the independence, privacy, happiness, safety, and security of retirement village residents.

Purpose of the toolkit

This toolkit is designed to assist those operators who may not have undertaken a redevelopment project before, or do not have engagement specialists within their organisation.

It provides example templates to help supplement the guidance document, supporting consistency in engagement practices, and providing practical resources to support effective, inclusive, and appropriate engagement.

STEP 1: PLAN

KEY QUESTIONS:

- Why do you need to engage?
- What does success look like for you and for your stakeholders?
- How will you reach your stakeholders?
- What engagement skills do you have within your team? What are your limitations and what skills need developing?
- What resources do you have available and what are your limitations?

Template: Clarify purpose and objectives

What is the purpose of your engagement project?									
What are the engagement objectives? (e.g. an informed community, a decision, a commitment or next step?)									
What is the scope of your engagement activities?									
What are the possible issues and level of risk? (High, Medium, Low)	<table border="1"> <thead> <tr> <th>Issue</th> <th>Level of risk (H, M, L)</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> </tbody> </table>	Issue	Level of risk (H, M, L)						
Issue	Level of risk (H, M, L)								
What are the benefits for stakeholders?									
What engagement has already occurred?									
Are there any negotiable and non-negotiable elements?									
Are there any limitations that need to be considered, such as resources and time?									
Will you need more than one stage of engagement? Will you engage different stakeholders using different communication methods?									
Who else needs to be involved in the planning process?									

Template: Identifying your stakeholders

Name of stakeholder organisation, group or individual. (Include a short description of the stakeholder)	
Interest in the project and level of knowledge of the project/activity (High, Medium, Low).	
Is there any prior history of engagement?	
Potential attitude towards the issue or activity (e.g. very concerned, concerned, indifferent, not concerned)	
Power to influence decision making	
Known or potential stakeholder issues, risks or limitations and proposed mitigation or management methods	
Appropriate methods of communication and engagement	
Key contacts	

STEP 2: PREPARE

KEY QUESTIONS

- Who will be impacted by the project, both directly and indirectly?
- Who has an interest in the project?
- What are your stakeholders' capabilities, needs and limitations?
- What is the prior history of engagement with your stakeholders? Any legacy issues that you need to consider?
- Is there data or information in your database that might be useful to inform future interactions?
- Who are the stakeholders that are critical to project delivery? Supporters? Detractors?

STEP 3: ENGAGE

KEY QUESTIONS

- Are your timelines and resources realistic?
- Are you engaging enough in the process?
- Do you have the resources and capabilities to undertake the chosen engagement methods? What do you need to do yourself and what might you be able to outsource?
- Do you have the mechanisms in place to monitor and evaluate resident/stakeholder feedback? What do you need to do to ensure they are in place?
- Do you have enough team members who are well versed in the engagement plan, capable, and trusted by residents to deliver it? Consider which team members have existing relationships with residents, and who can 'vouch' for new team members.
- What input did your stakeholders have and how was it used?
- How will you provide feedback to stakeholders?

Determine the level of engagement and formulate the engagement plan

An engagement plan should be a live document that describes how you will engage with the stakeholders you identified in Step 2 – PREPARE and should include things like purpose, objectives, stakeholders, level of engagement, communication methods and timeframes, roles and responsibilities, budget, resourcing, risks and mitigation plan, feedback plan/process, review and evaluation plan.

Template: Engagement activity plan

Stakeholder group (individual, organisation, group)	
Reason for engagement/ objective	
Timeframe for engagement	
Engagement/ communication methods/ channels	
Timing and frequency of engagement and communication	
Potential risks and important history	
Key messages	
Delivery resources (internal and external)	
Evaluation measures (how will you know if you're successful?)	
Feedback channels/ follow-up communication	

Implement and monitor engagement

With the engagement plan developed, you should now be prepared to carry out the engagement activities you have identified. Ensure all project and engagement staff are familiar with the planned activities and understand their roles and responsibilities.

It's also important to ensure stakeholders understand the engagement process (e.g. when and how they will be consulted and timeframes for providing feedback etc).

Template: Monitoring your engagement

Date	Progress notes	Difficulties	Stakeholders	What feedback will you provide and how?
Activity/task name				
Activity/task name				
Activity/task name				
Activity/task name				

Template: Stakeholder enquiry form

Name:				
<input type="checkbox"/> Media	<input type="checkbox"/> Resident	<input type="checkbox"/> Family / Next of Kin	<input type="checkbox"/> Community	<input type="checkbox"/> Other:
Date:			Time of enquiry:	
Organisation:				
Phone number:				
Email:				
Address:				
Enquiry:				
Response deadline:				
Person taking call:				
Reply made by:				
Date/Time:				
Reply:				

STEP 4: EVALUATE

KEY QUESTIONS

- What worked well and what have you learned?
- Did the engagement activities meet your objectives?
- Were there any unexpected challenges? How will you incorporate this into your learning/planning for next time?
- What could be done differently next time?
- Are residents and stakeholders satisfied? Has it delivered a positive/desired outcome for them?

Template: Review and measure engagement activities

(Repeat for each activity/task)

Activity/ task	
Was the engagement task delivered on time? Why/why not?	
Was the engagement task delivered on budget? Why/why not?	
Was the activity successful? Why/why not?	
How did we ensure the engagement was inclusive of those harder to reach?	
What lessons were learnt/what would you do differently in future?	
How will lessons be shared with others?	
How will necessary changes be made to future engagement activities?	

TYPES OF ENGAGEMENT ACTIVITIES

Below are some examples of common engagement activities. This list is not exhaustive but provides the more common tools used to support community engagement.

- Newsletters and publications (electronic or hard copy)
- Personalised letters/info packs
- Fact sheets
- Contact cards
- Public display (e.g. in communal area)
- Social media
- Videos
- Media releases and advertising
- Media engagement/events
- Community tours
- Face to face resident meetings
- Corporate documents
- Email/phone hotline
- Signage
- Website
- Stakeholder register
- Q&As
- Key messages
- FAQs
- Public consultation
- Surveys
- Stakeholder forums
- Focus groups
- 'Town hall' meetings/information sessions
- Social functions
- Community sessions
- Coffee catchups
- Open days
- Advisory panels
- Workshops
- Consultative committees
- Reference groups
- Partnerships
- Multi-stakeholder initiatives
- Processes/protocols/procedures

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