



National
Co-ordinating
Centre for
Public Engagement

Public Engagement Professional (PEP) Capabilities Framework

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Introduction

Public engagement professionals play a vital role in connecting research, knowledge and expertise with the needs, experiences and priorities of people, organisations, places and communities. The work is complex, relational and often spans multiple activities, from building partnerships and facilitating to influencing strategy, supporting culture change and evaluating impact.

The PEP Capabilities Framework (PEPCF) has been developed to help individuals and teams better understand the breadth of professional practice within public engagement. Rather than defining a single pathway or job role, the framework recognises that public engagement professionals bring different strengths, experiences and areas of expertise to their work. Most people will identify with multiple aspects of the framework rather than a single profile or specialism.

This framework has been designed as a reflective and developmental tool and we have designed a [workbook](#) to accompany it to guide you through. It can help practitioners identify their strengths, areas for growth and future development needs. It can also support managers and team leaders to understand the capabilities within their teams, identify gaps and plan professional development more strategically.

There is no "ideal" profile and no expectation to demonstrate strength across every area. Instead, the framework recognises that being a public engagement professional depends on diverse skills, experiences and perspectives working together.

References used to inform this framework

The PEP Capabilities Framework has been informed by:

- 10 years of the NCCPE's Engage Academy, including being piloted with 2026 Engage Academy participants
- [PEP Insights Research Short Report | NCCPE](#)
- A review of PEP role descriptions from across the UK in 2020
- A skills bingo developed with PEPs in 2018
- The NCCPE [civic capabilities](#) framework from 2025
- The JISC Business and Community Engagement framework from 2014
- [The KE attributes framework by Bayley, Phipps and Stevens 2018](#)
- [The Leading PE lens to the 2018 Vitae Researcher Development Framework](#)

- The scoping work by Ed Stevens and Helen Featherstone on PEP roles in 2016
- [Ogden Trust Leadership in Outreach & Public Engagement \(OPE\) Skills Framework in 2025](#)

Document overview

The framework is organised into three parts:

Part 1: PEP Personas and Attributes

- The personas describe the different ‘hats’ you wear as a PEP and how they might play out in your day-to-day role.
- The attributes describe the traits that underpin being a public engagement professional

Part 2: Exploring and Assessing Public Engagement Professional Capabilities

- Specifies the knowledge, skills and practices that help you deliver engagement
- Provides a breakdown of each skill onto a competency matrix that allows you to self-assess your/your teams' strengths, any development needs and areas for future growth.
- Option to track your skills on a spider diagram.

Part 3: Next steps and development

- Guides you through writing a development plan for yourself/ your team
- Useful links to resources for further learning.

Who is the framework for?

The framework is designed for public engagement professionals: people whose role is to enable, support, coordinate, advise on, manage or lead public engagement within organisations.

Public engagement professionals often work behind the scenes, creating the conditions that enable high-quality engagement to happen. They may support researchers, students, community partners, practitioners, leaders and organisations to design, deliver, evaluate and embed engagement activities and approaches.

They may work in universities, research institutes, learned societies, charities, cultural

organisations, funding bodies, local authorities or other organisations with a public engagement mission. Their roles often span strategy, partnership development, facilitation, evaluation, capacity building, communications, programme management and organisational change.

Below are two examples of user types who might employ the framework for different purposes:

1. Individual Public Engagement Professionals

Can use the framework to:

- Reflect on their current strengths and areas of expertise.
- Identify opportunities for professional development.
- Plan learning and career progression.
- Recognise capabilities that may not be formally acknowledged in their role.
- Articulate the value and breadth of their work.

2. Managers and leaders of engagement teams

Can use the framework to:

- Understand the collective strengths of a team
- Identify capability gaps and development priorities
- Support meaningful development conversations
- Inform recruitment and workforce planning
- Build balanced teams with complementary skills and expertise
- Strengthen organisational capacity for public engagement

How to Use the Framework

The framework is intended to be flexible and can be used in a variety of ways depending on your needs. Below is a general step by step guide to follow when working through the framework.

How to use the framework:

1. Explore the different hats you wear.

Begin by reading the personas and attributes in Part 1:

- a. Consider which personas most closely reflect your current work and strengths.
- b. Think of specific examples of when you have embodied the personas in your practice.
- c. Remember that most people will strongly identify with several personas rather than just one.
- d. Reflect on the attributes that underpin your practice and consider which are particular strengths and which you may wish to develop further.

2. Explore and Assess your PEP capabilities

2.1 Explore the Capabilities of Public Engagement Professionals

- a. Read through each of the six capability areas.
- b. Highlight the knowledge, skills and practices that resonate most strongly with your current role and experience.
- c. Consider whether there are important areas that are currently underused in your role or are areas of future interest.

2.2 Assess your current Capability Profile

- a. Use the maturity matrices in Part 2 to reflect on your confidence, capability and experience across different areas of practice.
- b. Work through each matrix gathering examples from your own work.
- c. Assess your current level of maturity across each area.
- d. Create a spider diagram to visualise your findings and help identify areas where you would like to strengthen your skills or deepen your expertise.

3. Plan your Development

- a. Use your reflections and assessment results to create a personal or team development plan.
- b. Identify priority areas for development
- c. Use the suggested resources to support your learning.

The framework works best when used as a reflective conversation starter rather than a scoring exercise. Its purpose is to support learning, development and recognition of the diverse contributions that public engagement professionals make.

Workbook

We have created an optional workbook that provides additional guidance, questions and structure to help you get the most out of the PEPCF. For each section of the framework there is an accompanying workbook section.

[Download the workbook](#)

Part 1: Personas and Attributes

1.1 Personas

The personas provide a way of understanding the different roles that public engagement professionals often play in their work.

They are not job titles, organisational positions, or fixed categories. Instead, they describe distinct ways of contributing to successful public engagement practice. Each persona highlights a combination of strengths, approaches and attributes that practitioners may draw on throughout their careers.

The personas are intended to help practitioners and teams recognise the diversity of skills that contribute to effective public engagement and provide a starting point for reflection, discussion and development.

How to use this section

Most people will recognise elements of multiple personas, and these may change over time as responsibilities, interests and career paths evolve. Some personas may feel more familiar because they reflect your current role, while others may represent areas you would like to develop.

Read through each persona and consider how closely it reflects your current role, strengths and ways of working. You may identify strongly with one persona, but most public engagement professionals will recognise elements of several. As you review the personas, highlight those that resonate most and make notes about the activities, responsibilities and experiences that connect you to them.

Think about which personas best describe your current practice, which are less familiar, and which represent areas you would like to develop in the future. This exercise can help you recognise the breadth of your contribution, build awareness of your strengths, and identify opportunities for professional growth. It can also provide a useful starting point for development conversations with colleagues, mentors or managers.

The Facilitator

“I help people think, learn, and create together.”

Approaches

- Enables collaboration by designing purposeful engagement that adapts to audience needs and power dynamics
- Uses participatory and co-creation methods, ensuring decisions are genuinely shared.
- Skilled at reading group energy, enabling psychological safety, and balancing voices.

Indicators

- Develops a lecture into a co-design session with shared outputs.
- Produces artefacts that show participant influence (maps, priorities, prototypes).

Attributes

- Empathy
- Curiosity
- Inclusivity
- Relational awareness
- Presence and attentiveness
- Adaptability

Areas to develop

- Strategic influence
- Institutional navigation

The Ethics guardian

“I ensure engagement is safe, respectful, equitable, and well-designed.”

Approaches

- Embeds accessibility and EDI from the first design step, not as an add-on
- Uses risk assessment, trauma-informed practice, and safeguarding as enablers, not barriers.
- Ensures data, consent, and participant rights are consistently respected.

Indicators

- Creates inclusive, accessible materials; runs ethical checks; documents decisions.
- Partners feel safe, respected and able to contribute.

Attributes

- Inclusivity
- Authenticity
- Relational awareness
- Kindness and compassion
- Self-awareness
- Dependability

Areas to develop

- Culture change work.
- Strategic storytelling.

The Partnership Builder

“I build trust-based relationships that last.”

Approaches

- Understands community motivations, histories, and tensions
- Brokers connections, clarifies expectations, and repairs trust when needed.
- Maintains CRM logs, closes feedback loops, and enables reciprocal value exchange.

Indicators

- Strained partnerships stabilised via clear ways-of-working agreements.
- Partners describe the relationship as reliable, fair, and transparent.

Attributes

- Empathy
- Relational awareness
- Authenticity
- Dependability
- Encouragement and appreciation
- Kindness and compassion

Areas to develop

- Evaluation
- Evidencing impact.

The Evidence Translator

“I help people learn from their work and make better decisions.”

Approaches

- Designs proportionate evaluations using logic models or other frameworks
- Synthesises data into usable insights (e.g., one-page “data stories”).
- Builds learning loops across teams (after-action reviews, retrospectives).

Indicators

- Evaluation findings shape changes in programme design, not just reports.
- Creates playbooks, learning briefs, or reusable templates.

Attributes

- Curiosity
- Self-awareness
- Pragmatism
- Reflectiveness
- Encouragement and appreciation

Areas to develop

- Political / strategic influencing.

The Strategist

“I align engagement with institutional and civic priorities.”

Approaches

- Horizon scans, frames opportunities, and aligns engagement with mission and local priorities.
- Advocates effectively with evidence and narratives.
- Designs governance structures, sponsor groups, KPIs, and roadmaps.

Indicators

- Produces clear options papers or time-bound pilots.
- Helps senior leaders understand public engagement as an enabler, not an optional extra.

Attributes

- Curiosity
- Pragmatism
- Authenticity
- Self-awareness
- Relational awareness
- Adaptability

Areas to develop

- Community and partnership depth.

The Systems Enabler

“I make engagement reliable, visible, and easy for others to deliver.”

Approaches

- Designs user-centred PE services (front doors, workflows, SLAs)
- Manages events, risk, budgets, suppliers, and processes.
- Creates clear communications, digital content, and operational documentation.

Indicators

- Engagement runs smoothly with fewer crises, better handovers, and consistent communications.
- Publishes “How to work with us” guidance or dashboards.

Attributes

- Dependability
- Pragmatism
- Self-awareness
- Boundary-setting
- Encouragement and appreciation

Areas to develop

- Co-creation craft
- High-level strategy.

The Research Translator

"I help research travel from academic contexts into outcomes for people."

Approaches

- Understands the whole research lifecycle, spotting engagement opps. at each stage.
- Bridges different knowledge worlds — research, policy, practice, community

Indicators

- Builds a logic model or theory of change linking research aims with real-world outcomes.
- Produces a public-friendly research narrative, visualisation, or co-developed brief.

Attributes

- Curiosity
- Inclusivity
- Empathy
- Authenticity
- Presence and attentiveness
- Reflectivity

Areas to develop

- Operational consistency and handovers, Letting go of being the “bridge” and empowering others to translate.

The Tactician

"I make small amounts go a long way, by aligning people, agendas and opportunities."

Approaches

- Spots leverage points: existing events, comms cycles, institutional priorities, civic agendas.
- Builds coalitions across researchers, professional services and external partners.
- Articulates value in ways that resonate with senior leaders (risk reduction, visibility, civic alignment, REF/KEF outcomes).

Indicators

- Turns a £2k pilot budget into a cross-faculty programme by aligning with an existing initiative.
- Gets researchers invested by framing engagement as solving their problem, not adding work.

Attributes

- Pragmatism
- Diplomacy
- Relational awareness
- Boundary-setting
- Dependability
- Self-awareness

Areas to develop

- Deep craft in creative facilitation or EDI detail.
- Protecting boundaries to avoid burnout.

1.2 Attributes

Attributes are the personal qualities and behaviours that underpin effective PEP practices. They influence how you build relationships, create trust, respond to challenges, navigate complexity and work with others. While they are often less visible than project outputs or measurable outcomes, they are fundamental to inclusive, ethical and impactful engagement.

How to Use This Section

Read through the list of attributes and highlight those that you feel are evident in your practice.

For each attribute consider:

- When you draw on it
- Which aspects of your role require it
- How it contributes to your practice as a public engagement professional.

Where possible, note examples from your work. You might reflect on how you use empathy when working with different stakeholders for example, or how your curiosity is important when exploring new opportunities, or how pragmatism is part of your practice when balancing competing priorities.

You do not need to identify with every attribute. The aim is to recognise the strengths you already bring to your work, including those that may be less visible or formally acknowledged. You may also identify attributes that you would like to strengthen as part of your professional development.

Attributes

Empathy

Understanding and valuing the perspectives, experiences and needs of others.

Inclusivity

Actively creating opportunities for diverse people and perspectives to participate and contribute.

Curiosity

Being open to new ideas, experiences and ways of thinking, and seeking to learn from others.

Authenticity

Building trust by being genuine, transparent and true to your values.

Relational awareness

Recognising and responding thoughtfully to relationships, power dynamics, emotions and group interactions to support inclusive and effective engagement.

Kindness and compassion

Approaching people with care, respect and understanding, particularly during challenging situations.

Presence and attentiveness

Listening actively, being fully engaged and giving people your attention.

Dependability

Following through on commitments and being someone others can rely on.

Pragmatism

Balancing ambition with realism to find practical and effective solutions.

Encouragement and appreciation

Valuing the contributions of others, recognising their strengths, and creating an environment where people feel supported, confident and motivated to participate.

Boundary-setting

Setting, communicating and maintaining clear expectations, limits and responsibilities in ways that support effective relationships, ethical practice and wellbeing.

Self-awareness

Understanding your own strengths, biases, limitations and impact on others.

Reflectiveness

Taking time to learn from experience, consider different perspectives, and use insights to improve future practice.

Adaptability

Adjusting your approach in response to changing circumstances, emerging opportunities, or the needs of different people and communities.

Part 2: Exploring and Assessing Public Engagement Professional Capabilities

Public engagement professionals draw on a broad range of knowledge, skills and practices to support, enable and embed high-quality engagement. Part 2 is designed to help you explore this capability landscape and reflect on your own strengths, experiences and development needs.

The section is organised into two complementary stages. Section 2.1 introduces the core knowledge, skills and practices that underpin effective public engagement professional practice. Section 2.2 provides a set of maturity matrices to help you assess your current capability, identify areas for development and create a foundation for future learning.

Whether used individually or as a team exercise, Part 2 is intended to support reflection, professional growth and conversations about capability development across the public engagement profession.

2.1 Key areas of skills, knowledge and practices

This section describes the knowledge, skills and practices that underpin effective public engagement professional practice. Organised across six capability areas, it provides an overview of the breadth of expertise required to support, enable and embed high-quality public engagement.

Rather than assessing performance, this section is designed to help you explore the capabilities of the profession and consider how they relate to your own role, experience and aspirations. As you work through the capability areas, reflect on the areas that resonate most strongly with your current practice and identify examples that demonstrate how these capabilities are applied in your work.

How to use this section

As you work through each capability area, identify and note down:

- The knowledge, skills and practices that you or your team can demonstrate with confidence
- Specific examples that illustrate how these capabilities are applied in practice, drawing on your day-to-day work, projects, partnerships and achievements.
- Areas where your experience is limited or where further development would be beneficial.

By the end of this section, you should have a clear picture of your/your team's current capability profile, including key strengths and potential areas for growth.

Keep your notes and examples, as you will use them in Section 2.2 to assess the maturity of these capabilities and identify opportunities to further develop your practice.

Areas of Knowledge, Skills and Practice

- [Ethics, Inclusion, Duty of Care & Quality](#)
- [Partnership, Community & Relationship Management](#)
- [Evidence, Evaluation, Learning](#)
- [Strategic Insight, Governance & Culture Change](#)
- [Operational Delivery, Comms & Service Design](#)

Engagement Design, Facilitation & Co-creation: Craft of public engagement.

➤ Related Personas: Facilitator, Partnership Builder, Tactician

Knowledge	Skills	Practices
• Participatory and deliberative methods; co-design/ co-creation • Group dynamics; psychological safety; trauma-informed facilitation • Inclusive communication and accessible design	• Designs to purpose and audience; tests assumptions with users/partners • Facilitates diverse groups; manages challenge; keeps focus on purpose • Adapts in the moment (pace, method, media); practices equitable participation • Co-creates plans, artefacts and decisions with publics and researchers	• Begins with shared agreements; rotates voice; names and handles bias in real time • Uses plain language; visualises ideas; captures and plays back the group's thinking • Plans closure: 'what happens next, who owns it, and how is value shared'

Ethics, Inclusion, Duty of Care & Quality: Doing engagement well, safely, ethically

- Related Personas: Ethics guardian, Partnership builder, Facilitator

Knowledge	Skills	Practices
• EDI frameworks; accessibility standards; safeguarding; risk; data governance (GDPR/FOI) • Ethical co-production; consent; moral rights; attribution; fair benefit-sharing • Quality assurance in engagement services and events	• Designs inclusive, proportionate, ethical engagement (methods, materials, venues) • Runs ethical checks; mitigates risk; escalates concerns; records decisions • Applies accessibility from first principles (communication, venue, digital, process) • Builds simple QA loops (pre-mortems, checklists, debriefs)	• Names power dynamics; invites critique; adjusts plans when equity is impacted • Documents consent and data practices clearly; maintains auditable trails • Foregrounds participant safety, dignity and care in all logistics

Partnership, Community & Relationship Management: Doing relational work well

- Related Personas: Partnership builder, Systems enabler and strategist, Tactician, Ethics guardian

Knowledge	Skills	Practices
• Partnership lifecycles; MoUs; role clarity; IP/attribution basics • Community journeys; segmentation; motivations; feedback channels • Negotiation, mediation and conflict resolution approaches	• Brokers connections; clarifies expectations and roles; agrees “ways of working” • Manages multi-party relationships; holds constructive tension; repairs trust • Builds community pipelines; uses CRM to track asks, promises and follow-through • Closes feedback loops; reports value to partners in their language	• Responds promptly and consistently; keeps promises visible (confirmation & recap) • Makes value exchanges explicit; co-authorship/credit discussed early • Shares failures/learning with partners; invites joint decision-making

Evidence, Evaluation, Learning: Learning and evidence to improve engagement and demonstrate value

➤ Related personas: Evidence translator, Systems enabler, Tactician

Knowledge	Skills	Practices
• Evaluation designs (logic models, contribution/Outcome Harvesting, qualitative/quantitative basics) • Indicators for engagement quality, reach, outcomes and impact • Knowledge sharing: synthesis, translation, products, routes to uptake	• Co-defines success criteria; designs proportionate evaluation • Collects, analyses and synthesises data ethically; visualises findings • Builds learning loops (after-action reviews, retrospectives, learning briefs) • Produces usable outputs (cases, playbooks, data stories); shares insights to change practice	• Tests what matters, not just what's measurable; is explicit about uncertainty • Shares 'warts-and-all' learning; credits contributors; stores artefacts accessibly • Uses insight to stop/scale/shift decisions, not just for reporting

Strategic Insight, Governance & Culture Change: Setting direction and influencing culture

➤ Related Personas: Strategist, Systems enabler, Evidence translator

Knowledge	Skills	Practices
• Strategy and governance • External drivers • Strategy tools • Change models	• Aligns PE to institutional mission • Conducts horizon scanning; interprets signals; triages/prioritises opportunities • Frames compelling narratives for PE; advocates with evidence • Designs and leads culture-change interventions; builds coalitions; ‘manages up’ • Translates strategy into roadmaps, KPIs and resourcing asks	• Surfaces trade-offs transparently; names risks early; keeps stakeholders informed • Creates psychological safety for honest discussion and course correction • Contributes to organisational policy design and change • Centres public value when choices compete; documents decisions and learning

Operational Delivery, Comms & Service Design: Enabling professional practice

- Related Personas: Systems enabler, Ethics guardian, Research translator

Knowledge	Skills	Practices
• Project/programme management; risk; budgeting; procurement; event logistics • User-centred service design; process improvement; service standards • Digital and print communications theory; narrative; channel strategy; digital accessibility • Communicating the value and impact of public engagement through evidence, stories and case studies. • Adult learning; training design; communities of practice	• Plans and delivers programmes/events safely; manages suppliers and budgets • Designs/iterates services and workflows; sets SLAs; monitors quality • Crafts communication plans; creates inclusive content; analyses engagement data • Develops compelling narratives that communicate the value of public engagement to different audiences. • Creates clear digital pathways that enable participation, feedback, learning and ongoing engagement. • Builds capability (training, mentoring); convenes communities of practice	• Uses checklists and risk logs; anticipates pinch points; escalates early • Communicates with consistency; briefs spokespeople; closes projects with a documented handover • Shares assets and learning; invites the community to improve services • Uses evidence and stories to make public engagement visible and valued. • Creates opportunities for dialogue, feedback and learning through communications and digital channels. • Publishes clear routes into engagement and encourages ongoing participation.

2.2 Maturity Matrices – Evaluating your strengths and development areas

Having explored the capabilities of public engagement professional practice in Section 2.1, this section provides a structured way to assess your current level of capability and experience.

Drawing on the examples gathered in Section 2.1, you will assess both the breadth and depth of your experience across each capability area.

The purpose of this exercise is not to achieve the highest level in every area. Instead, it is intended to help you understand where your strengths lie, identify opportunities for growth and make informed decisions about your professional development.

Using the Maturity Matrix: Things to Consider

1. **Be honest about your current position.** The value of the exercise comes from accurately reflecting your current level of experience and capability rather than where you think you should be.
2. **Consider your evidence.** Base your assessment on examples from your practice, achievements, behaviours and experiences, rather than confidence or perceptions alone.
3. **Remember that development is not linear.** You may be operating at different maturity levels across different capability areas.
4. **Focus on priorities, not perfection.** Greater maturity is not always the goal for every capability.
5. **Use the results as a conversation starter.** The matrix is designed to support reflection, development planning and constructive discussions with managers, mentors or colleagues.

The results should be viewed as a snapshot in time. Revisiting the exercise periodically can help you track progress, celebrate development and identify new areas for growth as your role evolves.

For managers, the matrices can also support conversations about team balance, capacity and development needs. Used collectively, they can help identify where expertise already exists, where additional support may be needed, and where investment in training or recruitment could strengthen overall capability.

The matrices are not intended to provide a definitive measure of competence. Instead, they offer a structured way to reflect on practice, celebrate strengths and identify opportunities for growth. Ultimately, the goal is to support a stronger, more confident and more connected public engagement profession.

Levels of maturity

The below matrices have four levels of maturity:

- Foundation (level 1): You have a basic understanding of the capability and are beginning to apply it in practice, often with guidance or support.
- Practitioner (level 2): You can apply the capability independently and confidently in a range of situations, adapting your approach where needed.
- Lead (level 3): You demonstrate advanced expertise, lead complex work in this area, and support the development of others.
- Strategic (level 4): You influence practice beyond individual projects, helping to shape organisational approaches, culture, systems and standards.

Engagement design, facilitation and co-creation

	Foundation	Practitioner	Lead	Strategic
Knowledge	Basic facilitation; Basics of inclusion; Basic PE methods	Advanced facilitation methods; awareness of group dynamics and power dynamics	Co-production frameworks; trauma-informed practice	Standards for excellence; implements and designs institutional training needs
Skills	Co-facilitates; adapts tone/pace	Designs sessions; manages dynamics; enables equity	Leads co-creation; handles conflict; adapts fluidly	Shapes institutional engagement practice; leads innovation
Practices	Uses ground rules; rotates voices	Names bias; ensures equitable participation	Holds psychological safety; supports difficult dialogues	Embeds co-creation principles institution-wide

Ethics, inclusion, duty of care and quality

	Foundation	Practitioner	Lead	Strategic
Knowledge	Basic inclusion, safeguarding, GDPR	EDI frameworks; accessibility; ethics of participation	Compliance systems; trauma-informed approaches	Institutional ethics; sector frameworks; legal context
Skills	Applies inclusive basics; flags risks	Designs inclusive practice; mitigates risk; ensures accessibility	Oversees ethics; mentors others; manages complex risks	Shapes institutional ethics; aligns systems
Practices	Uses accessible formats; checks barriers	Names power issues; adjusts plans for equity	Provides safe escalation routes; models transparency	Embeds equity and safety in institutional policy

Partnership, community and relationship management

	Foundation	Practitioner	Lead	Strategic
Knowledge	Partnership basics; community needs	Governance models; segmentation	Mediation; multi-partner governance	Cross-sector civic/HE partnership systems
Skills	Builds rapport; manages simple interactions; logs commitments	Manages relationships; clarifies roles; navigates tensions	Leads complex partnerships; rebuilds trust; brokers alliances	Shapes institutional partnership strategy; external representation
Practices	Responds consistently; follows through	Balances needs fairly; makes value exchange explicit	Facilitates shared decisions; documents agreements	Creates sustainable, reciprocal partnership ecosystems

Evidence, evaluation, learning & knowledge sharing

	Foundation	Practitioner	Lead	Strategic
Knowledge	Basic evaluation; data ethics	Logic models; outcomes/indicators	Evaluation governance; learning systems	Sector-level impact evidence; organisational learning ecosystems
Skills	Collects data; notices learning	Designs evaluations; analyses data; synthesises findings	Leads evaluation frameworks; mobilises knowledge	Sets evaluation culture; makes evidence-based decisions
Practices	Records accurately; shares early insights	Embeds learning loops; shares findings	Ensures evaluation informs decisions	Invests in long-term learning infrastructure

Strategic insight, governance and culture change

	Foundation	Practitioner	Lead	Strategic
Knowledge	Basic awareness of mission, governance, strategy	Understands structures, incentives, planning cycles	Deep knowledge of governance, policy, culture change	Whole-system HE + civic/policy ecosystems
Skills	Aligns tasks with priorities; follows guidance	Interprets signals; contributes to planning; frames purpose	Shapes strategies; leads culture change; coaches others	Sets institutional direction; influences sector agendas
Practices	Asks questions; shares intelligence; prepares well	Highlights risks early; summarises insights	Documents decisions; builds coalitions; fosters safety	Shapes policy; ensures conditions for sustained change

Operational delivery, communications & service design

	Foundation	Practitioner	Lead	Strategic
Knowledge	PM basics; event logistics; templates; accessibility; communications theory	Project cycles; risk; segmentation; user journeys; implements communications strategy & development	Multi-project governance; QA systems; service design; Evidence based communications strategy	Institutional operational strategy; service models
Skills	Uses checklists; delivers assigned tasks	Runs projects; designs comms; improves services	Leads programmes; sets service standards; Develops narratives, case studies and communication approaches that demonstrate the value and impact of public engagement.	Shapes service culture; directs investment; Uses communications and storytelling to influence organisational understanding of public engagement and support culture change.
Practices	Escalates early; meets deadlines	Tracks performance; delivers safe events	Oversees risk; ensures consistency	Embeds sustainable, high-quality operations

2.3 Mapping your results: Spider Diagram

The spider diagram provides a visual representation of your current capabilities and where you would like to develop in the future.

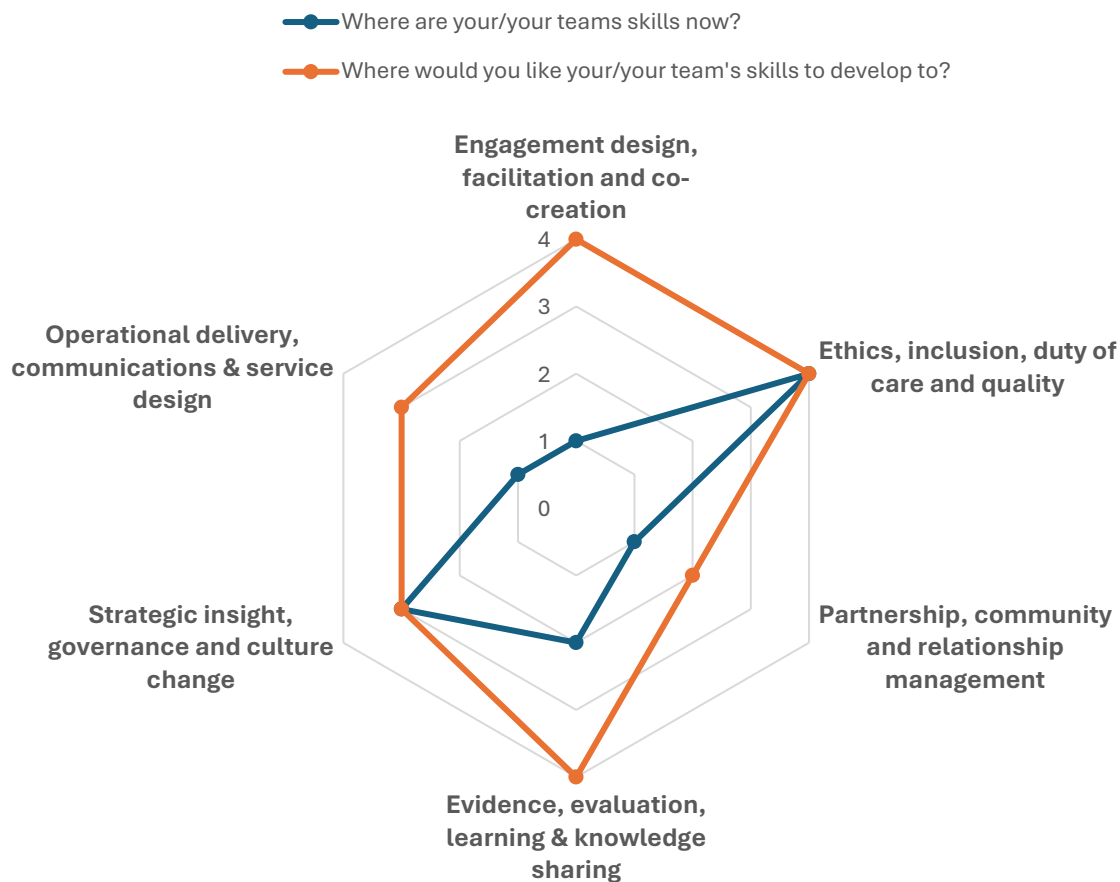
Comparing your current and aspirational levels can help you identify development priorities and areas for further reflection.

Example maturity data and spider diagram

Example data used to produce sample plot

	Current maturity level	Aspirational maturity level
Engagement design, facilitation and co-creation	1	4
Ethics, inclusion, duty of care and quality	4	4
Partnership, community and relationship management	1	3
Evidence, evaluation, learning & knowledge sharing	2	4
Strategic insight, governance and culture change	3	3
Operational delivery, communications & service design	1	3

Example Capability Maturity Spider Diagram



How to create your own Spider Diagram

Before you start: this Spider diagram will require you to have installed Microsoft Word and Excel (or other compatible software)

1. Download and save the [spider diagram excel spreadsheet](#) to your computer. Once the google doc opens, select: file – download – Microsoft Excel.
2. Complete the self-assessment exercise in [part 2.2](#) and assign a current [maturity level](#) for each key area/skill.
3. Assign an aspirational level. For each of the key areas, decide where on the scale you would like them to develop to in the future – your aspirational level. Please note - you may be content with your current position, in this case both maturity levels will be the same.
4. For each of your current and aspirational levels, assign a numerical value:
 - Foundation: 1

- Practitioner: 2
- Lead: 3
- Strategic: 4

5. In the excel spreadsheet, input your maturity levels into the relevant fields as a numerical value (see point 4).
6. The diagram should automatically update in the excel spreadsheet.
7. Once completed, feel free to copy and paste the diagram onto the workbook / into your notes.
8. Areas where the orange and blue lines diverge are sections where there is a gap between your aspiration and your current activity. These areas are worth exploring further using the online resources.
9. Save the Excel document with a new file name. You may wish to re-do the exercise at a later point to review your progress.

Part 3: Next Steps & development

3.1 Writing a Personal Development Plan

Personal Development Plan

Use the template below to turn your reflections from Parts 1 & 2 into a practical development plan.

- Please note: if you are writing a **team** development plan, please see workbook section 3.1

Reflection Questions

Before starting your plan, consider:

- Which capabilities have the greatest impact on your work?
- Which capability areas show the largest gap between your current and aspirational levels?
- Are there any personas you would like to develop into more fully?
- Which attributes would strengthen your practice if developed further?
- What opportunities already exist within your role to gain experience and build confidence?
- What practical steps could help you strengthen your areas for growth?

Examples might include:

- *Training or professional development.*
- *Shadowing colleagues.*
- *Mentoring or coaching.*
- *Stretch projects.*
- *Communities of practice.*
- *Networking and peer learning.*
- *Reading and self-directed learning.*

Capability area	Capability Type (Skill / Knowledge / Practice / persona / Attribute)	Current Situation	Development Actions	Action deadlines	Support Needed	Success Measures
EXAMPLE: Evidence, evaluation and learning	Knowledge & Practice	Confident collecting feedback but limited experience designing evaluation frameworks	• Complete Evaluation 101 tutorial to begin deepening knowledge • Attend evaluation training • Shadow experienced colleagues; • Lead evaluation planning for a project	All actions to be completed in 1 years' time.	A mentor would be useful, so I could explore and develop ideas	Independently design and implement effective evaluations.

Review Dates

Make sure to check in with your plan at different intervals. This will help you keep track of where you're up to and adjust your goals if needed.

Review Date	Progress made	Next steps

3.2 Useful resources

Engagement Design, Facilitation & Co-creation

[Quality Practice | NCCPE](#)

The NCCPE's framework for planning, delivering and reflecting on high-quality public engagement, grounded in values of purpose, inclusivity, learning and mutual benefit.

[High Quality Engagement 101](#)

An introductory tutorial that explores the principles, characteristics and practical foundations of effective public and community engagement.

[High Quality Engagement Resources](#)

A curated collection of tools, guides and case studies to support the design, delivery and review of high-quality engagement activity.

[Participatory Methods](#)

An international resource showcasing a wide range of participatory tools and techniques to support collaborative inquiry, learning and action.

[Methods | Involve](#)

A practical library of participatory and deliberative methods to help practitioners select and design appropriate engagement approaches for different purposes, audiences and contexts.

Ethics, Inclusion, Duty of Care & Quality

[Community-based participatory research: A guide to ethical principles and practice | NCCPE](#)

A practical guide to the ethical considerations, principles and approaches that underpin community-based participatory research.

[Accessible and Inclusive Practice Guidelines | NCCPE](#)

Guidance on creating engagement activities that remove barriers to participation and support inclusion for diverse audiences and communities.

[Achieving Equity in place based research](#)

A report exploring how researchers and communities can work together more equitably within place-based partnerships and collaborative research.

[UKRIO – Equality, Diversity and Inclusion](#)

Guidance on embedding equality, diversity and inclusion within research and engagement activities, with a focus on responsible and ethical practice.

[Responsible Knowledge Exchange, Engagement and Impact | Social Sciences Division, University of Oxford](#)

A framework and resource hub promoting ethical, equitable and responsible approaches to knowledge exchange, engagement and research impact.

Partnership, Community & Relationship Management

[A guide to working with local communities | NCCPE](#)

Practical advice on building respectful and effective relationships with local communities, including planning, communication and collaboration.

[The Principles of Partnership Working | NCCPE](#) - tutorial

A short tutorial outlining the key principles that contribute to successful, equitable and sustainable partnerships.

[The Partnership Cycle | NCCPE](#)

A framework for understanding and managing partnerships, from initiation and development through to review, renewal or closure.

[Place Navigator](#)

A resource designed for place-based working in universities; it helps plan who you might work with in place and how you might work together.

Evidence, Evaluation, Learning

[A quick guide to evaluation | NCCPE](#)

An introduction to planning and conducting evaluations, including setting objectives, gathering evidence and using findings effectively.

[Evaluation 101 | NCCPE](#)

A foundational tutorial covering the purpose of evaluation, common approaches and practical methods for assessing engagement activities.

[Creative Evaluation Methods: Find The Right Fit](#)

A resource showcasing participatory and creative approaches to evaluation that help capture rich evidence of experiences, outcomes and change.

[Better Evaluation](#)

A comprehensive international knowledge base offering frameworks, methods and tools for designing and improving evaluation practice.

Strategic Insight, Governance & Culture Change

[Assess your institutional culture: Introducing the EDGE tool | NCCPE](#)

An institutional self-assessment framework that helps organisations understand and strengthen support for public engagement and culture change.

[Understanding culture change | NCCPE](#)

A briefing that explores how organisational cultures evolve and what enables meaningful and sustainable change.

[Pathways to culture change | NCCPE](#)

Research and case studies examining the approaches universities use to embed engagement within institutional policies, systems and practices.

Operational Delivery, Comms & Service Design

[Project management: the start of the project journey | OpenLearn - Open University](#)

An introduction to project management principles, covering project planning, governance and delivery fundamentals.

[Project governance and Project Management Office \(PMO\) | OpenLearn - Open University](#)

A learning resource exploring governance structures, accountability and oversight mechanisms for successful project delivery.

[How To Test Your Communications](#)

A practical guide to testing communication materials and messages with audiences before wider implementation.

[Common Cause Handbook](#)

An influential resource on values-based communications, helping practitioners frame messages that encourage long-term engagement and social change.

[The Double Diamond - Design Council](#)

A widely used service design framework that supports structured problem exploration, idea generation, testing and implementation.