

EDGE self-assessment matrix

This tool allows you to assess your institution's support for public engagement. You can access a guide to how to use the tool here: www.publicengagement.ac.uk/edge-tool

You are welcome to use the EDGE tool for non-commercial educational purposes, where credit is given to the NCCPE.

EMBRYONIC



DEVELOPING



GRIPPING



EMBEDDING



The EDGE tool

	Focus	EMBRYONIC 	DEVELOPING 	GRIPPING 	EMBEDDING 
 Purpose	Mission	There is little or no reference to public engagement in the organisational mission or in other institution-wide strategies.	Public engagement is referenced sporadically within the institutional mission documents and strategies, but is not considered a priority area.	Public engagement is clearly referenced within the institutional mission and strategies and the institution is developing an institution-wide strategic approach.	Public engagement is prioritised in the institution's official mission and in other key strategies, with success indicators identified. It is a key consideration in strategic developments in the institution.
	Leadership	Few (if any) of the most influential leaders in the institution serve as champions for public engagement.	Some of the institution's senior team act as informal champions for public engagement.	Some of the institution's senior team act as formal champions for public engagement.	The Vice Chancellor acts as a champion for public engagement and a senior leader takes formal responsibility. All senior leaders have an understanding of the importance and value of public engagement to the institution's agenda.
	Communication	The institution's commitment to public engagement is rarely, if ever, featured in internal or external communications.	Public engagement occasionally features in internal and external communications.	Public engagement frequently features in internal communications, but rarely as a high-profile item or with an emphasis on its strategic importance.	Public engagement appears prominently in the institution's internal communications; its strategic importance is highlighted, and resources and strategic support have been allocated to sustain this.
 Process	Support	There is no attempt to co-ordinate public engagement activity or to network learning and expertise across the institution.	There are some informal attempts being made to co-ordinate public engagement activities, but there is no strategic plan for this work. Some self-forming networks exist, not supported by the institution.	Oversight and co-ordination of public engagement has been formally allocated (e.g. to a working group or committee) but there is minimal support and resource to invest in activity.	The institution has a strategic plan to focus its co-ordination, a body / ies with formal responsibility for oversight of this plan, and resources available to assist the embedding of public engagement. There are a number of recognised and supported networks.
	Learning	There is little or no opportunity for staff or students to access professional development to develop their skills and knowledge of public engagement.	There are some opportunities for staff or students to access professional development and training in public engagement, but no formal or systematic support.	There are some formal opportunities for staff or students to access professional development and training in public engagement.	Staff and students are encouraged and supported in accessing professional development, training and informal learning to develop their skills and knowledge of engagement.
	Recognition	Staff are not formally rewarded or recognised for their public engagement activities.	Some departments recognise and reward public engagement activity on an ad hoc basis.	The university is working towards an institution-wide policy for recognising and rewarding public engagement activity.	The university has reviewed its processes, and developed a policy to ensure public engagement is rewarded and recognised in formal and informal ways.
 People	Staff	Few if any opportunities exist for staff to get involved in public engagement, either informally, or as part of their formal duties.	There are opportunities for staff in a handful of faculties or departments to get involved in public engagement, either informally or as part of their formal duties.	There are structured opportunities for many staff members to get involved in public engagement; but not in all faculties or departments. There is a drive to expand opportunities to all.	All staff have the opportunity to get involved in public engagement, either informally or as part of their formal duties, and are encouraged and supported to do so.
	Students	Few opportunities exist for students to get involved in public engagement, either informally, through volunteering programmes, or as part of the formal curriculum.	There are opportunities for students to get involved, but there is no coordinated approach to promoting and supporting these opportunities across the institution.	Many (but not all) students have the opportunity to get involved in public engagement and are encouraged and supported to do so. There is a drive to expand opportunities to all.	All students have the opportunity to get involved in public engagement, and are encouraged and supported to do so. The institution offers both formal and informal ways to recognize and reward their involvement.
	Public	Little or no attempt has been made to assess community need, or to support 'non-traditional' groups in engaging with the institution.	Some attempt has been made to analyse community need and interest; and to begin to tackle access issues to open up the institution and its activities to the public.	The institution has committed resources to assessing community need and interests, and to using this insight and feedback to inform its strategy and plans.	The institution has assessed need and committed resources to supporting a wide range of groups to access its facilities and activities, and to systematically seek their feedback and involvement.

Mission

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Embedding in mission	Public engagement is not addressed explicitly in the institutional mission or in departmental / institution-wide strategies.	public engagement is referenced sporadically within the institutional mission documents and strategies, but is not considered a priority area.	Work is underway to review the institution's commitment to public engagement, in order to articulate a set of strategic priorities and embed these in the institutional mission and other relevant strategies.	Public engagement is prioritised in the institution's official mission and in other key departmental / institution-wide strategies, with success indicators identified.
Shared understanding of public engagement and its value	The term is used inconsistently and infrequently and very few staff have an understanding or appreciation of what it means or its relevance to their work.	References to public engagement appear in some institutional strategies and plans, but there is no institution-wide definition for public engagement.	Consultation is underway with internal and external stakeholders to share understandings of public engagement and its purpose, and to develop a shared definition.	The institution has consulted widely with internal and external stakeholders to develop a definition for public engagement and its purpose and value which is used consistently.
Strategic planning	There is no official strategic plan for advancing public engagement.	Although some short- and long-term goals for public engagement have been defined, these have not been formalized into an official strategic plan that will guide their implementation.	Work is underway to develop an official strategic plan for public engagement.	The institution has developed an official strategic plan for advancing public engagement, which includes viable short-term and long-term goals. A senior individual / team has formal responsibility for monitoring progress.
Alignment with other priorities	Public engagement rarely features as a component within wider institutional initiatives.	Public engagement occasionally features within wider institutional initiatives, but in a relatively piecemeal way.	Processes are being developed to ensure that public engagement is routinely considered during strategic planning.	Public engagement is routinely considered during strategic planning and institution-wide developments.

Leadership

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Senior leadership	Few (if any) of the most influential leaders in the institution serve as champions for public engagement.	Some of the institution's senior team act as informal champions for public engagement.	Some of the institution's senior team act as formal champions for public engagement.	The Vice Chancellor / Principal acts as a champion for public engagement; a senior leader takes formal responsibility; other senior leaders informally champion public engagement. All senior leaders have an understanding of the importance and value of public engagement to the institution's agenda.
Engagement Champions	Although some individuals choose to act informally as champions or ambassadors for public engagement, they receive no institutional support.	An informal public engagement champions network is beginning to emerge, enabling them to share approaches and offer some support to each other's work.	A critical mass of champions has emerged. The institution recognises the value of this network and the need to provide some formal support for it. Engagement champions are recognised from within, across and outside the institution.	Formal support for public engagement champions is provided by the institution, with regular opportunities to network with others across the institution and nationally.
Departmental / Faculty leadership	There is very limited or no informal support from departmental leaders for public engagement activity by their staff.	Informal support for public engagement activity is offered by a small but significant number of departmental or faculty leaders. Some department leaders struggle to support staff in this area.	A number of departments / faculties formally support public engagement activity by their staff, e.g. through recognising it in appraisal processes, and workload planning.	The majority of departments / faculties are committed at the highest level to actively supporting public engagement activity by their staff. All heads of department recognise the importance and value of public engagement, and are seeking ways to support it effectively.
Public involvement	There are very limited or no opportunities for the public or community partners to assume leadership roles within the institution (e.g. serving on advisory groups, providing feedback, collaborating on research).	There are some opportunities for the public or community partners to assume leadership roles within the institution, but there is no co-ordinated or planned approach to involving people from outside the institution.	There are a significant number of opportunities for the public or community partners to assume leadership roles within the institution, and attempts are being made to co-ordinate external involvement and to provide structured support.	Appropriate public / community representatives are formally welcomed and encouraged to serve in leadership and ambassadorial roles. External expertise is evidently valued. There is support for community capacity building, and a widespread commitment to seeking mutually beneficial outcomes through engagement.

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Internal communications promote and celebrate public engagement	The institution's commitment to public engagement is rarely if ever featured in internal communications.	Public engagement occasionally features in internal communications.	Public engagement frequently features in internal communications, but rarely as a high-profile item or with an emphasis on its strategic importance.	Public engagement appears prominently and consistently in the institution's internal communications; its strategic importance is highlighted, and resources and strategic support have been allocated to sustain this activity.
Research is undertaken into public perceptions and needs	The institution has not begun to analyse or research its different public stakeholders, or their attitudes, aspirations and expectations of them.	The institution has a limited understanding of its different public audiences and stakeholders and their attitudes, aspirations and needs.	The institution is investing in research and intelligence gathering to deepen its insights into its different public audiences and stakeholders and their aspirations and needs.	The institution has built an in depth understanding of its different public audiences and stakeholders and their aspirations and needs, and uses this intelligence actively to inform its communications, planning and evaluation of engagement.
Marketing and communications reflect commitment to engagement	Public engagement does not appear in the institution's marketing materials (e.g., website, promotional brochures, etc.). Few if any efforts are made to disseminate the results of activities.	Public engagement appears periodically in the institution's marketing materials. Results of public engagement activities are occasionally disseminated but on an ad hoc basis.	Public engagement appears frequently in the institution's marketing materials, including the website, brochures, press releases. Key networks and forums are kept updated on public engagement activity.	Public engagement appears prominently and consistently in the institution's marketing materials and communications activity. There are extensive efforts to share results of public engagement activities through diverse networks. Strategic support has been allocated to support this activity.

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Investment in expert support	There are no staff members with responsibility for supporting and embedding public engagement on the campus. There may be individuals in a few departments with public engagement roles.	There are some staff who are tasked with supporting and embedding public engagement; however, their appointments are temporary / not core funded and public engagement is only one of their responsibilities.	Staff are employed in the institution with explicit responsibility for supporting and embedding public engagement. Some appointments are permanent but most are temporary / not core funded.	The institution core funds staff members with expertise in public engagement, who take responsibility for supporting and embedding public engagement across the organisation.
Effective networks and co-ordination	There is no attempt to co-ordinate public engagement activity or to network learning and expertise across the institution.	There are some informal attempts being made to co-ordinate engagement activities, but there is no strategic plan for this work. Some self-forming networks exist, not supported by the institution.	Oversight and co-ordination of public engagement has been formally allocated (e.g. to a working group or committee) but there is minimal support and resource to invest in activity. There are some subject or career-level specific networks of engaged staff.	The institution has a strategic plan to focus its co-ordination, a body (or bodies) with formal responsibility for oversight of this plan, and resources available to assist the implementation and embedding of public engagement. There are a number of recognised and supported networks.
Opportunities for staff and students	There are few if any opportunities for staff to get involved in public engagement. Staff find their own external opportunities.	Several departments provide some opportunities for staff and student involvement, but there is no systematic support. Central brokerage may provide some details of external opportunities.	The majority of departments have made some provision to facilitate opportunities for staff and students to get involved in public engagement activities.	The institution actively facilitates and communicates opportunities to get involved, and provides practical support measures (e.g. brokerage; bursaries; fellowships; secondments). It also invests in institution-wide programmes that provide first steps.
Evaluation of activity	There is no organized, institution-wide effort underway to evaluate the quantity and quality of public engagement activities taking place, nor any recognition of the value of formative evaluation.	A few departments attempt to evaluate the number and quality of public engagement activities. There are no efforts across the institution. Evaluation is focussed on monitoring.	A systematic effort to evaluate the number and quality of public engagement activities has been initiated. Summative evaluation is common.	An ongoing, systematic effort is in place to evaluate the number and quality of public engagement activities that are taking place throughout the institution. Evaluation feedback is being used to inform future activity and strategy. Formative evaluation is an expected part of engagement activities.
Brokerage and partnership working	There is little or no attempt made to facilitate public access to information, advice or expertise within the institution. There is little or no support for staff outreach e.g. access to training, writing grant proposals for outreach projects.	Some basic 'signposting' is in place (e.g. web pages), to describe the institution's public engagement offer and facilitate contacts. There is some support for staff outreach.	Effective 'signposting' is in place, and there are some attempts being made to broker partnerships with external organisations. The organisation has active 'front doors' which will respond to new requests from outside. Staff are supported to initiate their own outreach projects.	The institution has invested in signposting to facilitate contact with the community, provides some dedicated brokerage and is taking a strategic approach to partnership development. It is involved in long-term partnerships with local community neighbours.

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Support for informal development	Few, if any, informal mechanisms exist to share information about public engagement. There is resistance to sharing best practice and groups feel in competition with each other. There is little or no attempt to involve individuals from outside organisations.	Informal mechanisms to share information about public engagement exist sporadically. People are keen to share experience and learn from each other. There are some opportunities to involve individuals from outside organisations.	Informal mechanisms exist to share information about public engagement. Regular events are organised. People are keen to share experience and learn from each other. Individuals from outside organisations are involved. More experienced colleagues act as informal public engagement mentors.	Informal mechanisms exist to share information about public engagement. Regular events aimed at different levels are organised by dedicated staff. People are keen to share experience and honest about failures. Individuals from outside organisations are actively involved and there is a public engagement mentor scheme (or similar) in place.
Building formal support into CPD programmes	The institution has no clear definition of public engagement or the skills required to do it. There is little or no opportunity for professional development in public engagement. There is little or no support for public engagement training providers.	The institution has defined public engagement, but not the skills or attributes to do it. There are some informal opportunities for professional development. There is some support for public engagement training providers.	The institution has clear definitions of both public engagement and the skills or attributes required to do it. The institution provides some strategic support for professional development to individuals with a public engagement element to their role. There is some support for research groups to develop a public engagement strategy. Public engagement training providers are encouraged to share course evaluations.	The institution has clear definitions of both public engagement and the skills or attributes required to do it. Individuals are supported to take a strategic and reflective approach to their professional development in public engagement. This could link to the appraisal system. Research groups are supported to develop a public engagement strategy which draws on different people's strengths, skills and interests. Training is evaluated and is of high quality. The institution supports a network of public engagement training providers.
Opportunities for learning	There are limited opportunities to try public engagement.	There are some opportunities to get involved in public engagement.	Training courses also provide opportunities to get involved in public engagement.	Training and development is linked to skills and opportunities to apply those skills. A reflective approach is encouraged and supported.
Infrastructure to support learning	The co-ordination of public engagement training and development activities in the institution is not included in any job descriptions. There is limited opportunity to create online resources or strategic support for professional development in public engagement.	Several staff roles include a remit to co-ordinate public engagement activities in the institution. There are some opportunities to create online resources and mailing lists. There is some infrastructure in place to support professional development in public engagement.	Posts which include a remit to co-ordinate public engagement activities are dispersed throughout the institution. There is significant investment in infrastructure to support professional development in public engagement. Information about professional development opportunities is linked to skills.	Posts which include a remit to co-ordinate public engagement activities are dispersed throughout the institution. Regular meetings support a 'joined-up' rather than 'top-down' approach to co-ordination. There is significant investment in infrastructure to support professional development in public engagement which is evaluated for effectiveness. Information about professional development opportunities is linked to skills.

Recognition

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Public engagement is featured in appraisal / performance review	Public engagement does not feature formally in university appraisal processes; there is no central policy for this.	Some departments feature public engagement as part of performance review; there is no central policy for this.	Many departments feature public engagement as part of performance review; but there is no central policy for this.	The university has reviewed its appraisal process, and developed a policy to ensure recognition for public engagement is built into its performance review processes.
Public engagement is included in relevant job descriptions	Public engagement does not feature in job descriptions.	Public engagement features occasionally in job descriptions.	Public engagement features consistently in some types of job descriptions but not others.	The university has conducted a systematic review of its role profiles, and integrated public engagement into relevant roles. There is a good understanding from managers of the competencies required for engagement.
Public engagement is included in promotions criteria	Public engagement does not feature in promotions criteria.	Some departments recognise public engagement as a legitimate activity in considering promotion, but on a case by case basis.	Some departments recognise public engagement as a legitimate activity in considering promotion, and do so on a formal, systematic basis.	There is a university wide policy to recognise public engagement within relevant promotions criteria.
Public engagement activity is celebrated through awards and prizes, and recognised informally	No prizes or awards are offered for engagement activity. There is little or no informal recognition offered to staff for their engagement activity.	Some awards / prizes are offered at a departmental level, but these are not high profile.	Some awards / prizes are offered at an institutional and departmental level but these are not high profile. Some departments offer informal recognition to their staff for their engagement activity.	Public engagement activity is celebrated with high profile awards, and through a range of informal mechanisms, such as internal communications.
Public engagement activity is encouraged, incentivised and reflected in workload planning	Few or no incentives are offered for engagement activity, and there is little encouragement for staff or students to get involved.	Some departments offer incentives (e.g. conference fees; sabbaticals, mini-grants) on an informal basis.	Some departments offer incentives (e.g. conference fees; sabbaticals, mini-grants) on a formal basis, and acknowledge public engagement within workload planning.	Most departments offer incentives to support staff and student involvement. Public engagement is a legitimate activity in workload planning for relevant roles.

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Awareness and participation	Few staff know what public engagement is or understand how it can be integrated into teaching, research, or other priorities. Very few are actively involved in any way.	A minority of staff know what public engagement is and can articulate how it can be integrated into teaching, research, and / or other priorities. A small number are actively involved, but do not perceive the organisation to be supportive of their efforts.	Many staff in most departments know what public engagement is and can articulate how it can be integrated into teaching, research, and / or other priorities. The institution is actively working to increase the support and recognition for staff involvement in engagement.	Most staff know what public engagement is and can articulate how it can be integrated into teaching, research and / or other priorities. The majority of staff support the embedding of public engagement into the institution's mission and into their own work, where relevant; many staff participate in public engagement, and feel that the organisation is supportive of their efforts.
Staff opportunities	Few if any opportunities exist for staff to get involved in public engagement, either informally or as part of their formal duties.	There are opportunities for staff in a handful of faculties or departments to get involved in public engagement, either informally or as part of their formal duties.	There are structured opportunities for many staff members to get involved in public engagement; but not in all faculties or departments. There is a drive to expand opportunities to all.	All staff have the opportunity to get involved in public engagement, either informally or as part of their formal duties, and are encouraged and supported to do so. Staff are encouraged to act as champions for embedding public engagement in their departments or throughout the institution.
Involvement of professional services and support staff	Staff in professional services and support roles, and their managers, have little or no understanding of public engagement, and take little or no responsibility for its delivery.	A few of the professional services and support staff and their managers have a clear understanding of public engagement, but they do little to make public engagement a visible and important part of the institution's work.	Professional services and support staff and their managers have a clear understanding of public engagement, but the majority do little to make public engagement a visible and important part of the institution's work.	The managers of the institution's professional services and support roles, and their teams, understand and support public engagement, and the majority actively contribute to making public engagement a visible and important part of the institution's work.

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A shared sense of purpose	There is no institution-wide understanding of student engagement, or the internal and external drivers for supporting it.	Student engagement occasionally features within larger institutional initiatives, but in a relatively piecemeal way.	Key stakeholders have been brought together. Objectives have been clarified and a strategic plan has begun to develop.	Key stakeholders – students, staff and community partners – have been involved to explore and then articulate the purposes and benefits that student engagement serves.
An efficient and ‘joined up’ support infrastructure	There is no identified or dedicated support for student involvement in public engagement.	There is some identified support for student involvement in public engagement, which has some (limited) understanding of good practice in this area.	Intelligence has been gathered about the current provision across the institution, and a way of monitoring the effectiveness and efficiency of the infrastructure (e.g. a senior leader / committee) is in place. Investment is being made to plug any gaps.	The current provision for student engagement across the institution has been reviewed, including how best to ensure that it is ‘joined up’ and delivers maximum value for the investment being made.
Leadership and advocacy	Few, if any, opportunities exist for students to take on leadership roles in advancing public engagement in their departments or throughout the institution.	Although some individuals choose to act informally as champions or ambassadors for student engagement, they receive no institutional support.	There is a senior leader with responsibility for supporting student engagement, and a small number of students have formal responsibility for championing engagement with their peers.	There is an active network of ambassadors for student engagement supported across the institution. The ambassadors include academic staff, professional services staff, and students at all levels.
Recognise learning and celebrate achievement	The institution has neither formal nor informal mechanisms (e.g. prizes) that encourage students to participate in public engagement or reward students for their participation.	While the institution offers some informal incentives and rewards (e.g. publicity, prizes) that encourage students to participate in public engagement and / or reward them, the institution offers few or no formal incentives and rewards.	Formal and informal incentives (e.g. prizes, publicity awards etc.) are offered. The institution has explored the potential to integrate these within teaching and learning strategies, and offers informal routes to capture and demonstrate learning.	The institution has addressed how best to provide recognition for students, and has provided support for students to reflect on and capture their learning through engagement.
A clear and effective offer	There is no co-ordinated approach to informing students about opportunities that are available to engage with the public.	While there are some mechanisms for informing students about public engagement opportunities that are available to them, it is not clear how these are connected to wider initiatives (e.g. student experience, employability).	There are mechanisms in place to inform students about opportunities, as well as a published ‘pledge’ that articulates how the university supports engagement.	There is a clearly articulated ‘offer’ to students that articulates why engagement is valued as part of their experience at your institution, and how they can expect to access opportunities to engage with the public.

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Awareness	Few if any of the individuals or organisations who have contact with the university are aware of the institution's goals for their public engagement activity or the opportunities on offer.	Some sporadic efforts are being made to communicate to the public the institution's goals for their public engagement activity and the opportunities on offer.	The institution is reviewing the impact of its communications and is checking the public's awareness of the institution's goals for their public engagement activity and the opportunities on offer. There is a commitment to improvement in this area.	Individuals or organisations who have contact with the university are systematically told about the institution's goals for their public engagement activity and the full range of opportunities on offer; there is widespread awareness and appreciation of the activity.
Access	Little or no attempt has been made to assess community need, or to support 'non-traditional' groups in engaging with the university.	Some attempts are being made to support 'non-traditional' groups; to analyse need; to begin to tackle access issues.	The institution has assessed need and committed resources to supporting a wide range of groups to access its facilities.	The institution has assessed need and committed resources to supporting a wide range of groups to access its facilities. These activities are informed and influenced by members of the public and external groups.
Infrastructure	No investment in infrastructure has been made to support access and involvement (e.g. helpline; helpdesk; enquiry handling process).	There are some attempts being made to support access and involvement in some departments (e.g. enquiry handling process and a central point of contact).	The institution is reviewing its current infrastructure to support access and involvement and is actively involving community representatives in the process to better understand their needs.	Significant investment in infrastructure has been made across the institution to support access and involvement (e.g. helpline; helpdesk; enquiry handling process).
Feedback	There is little or no attempt to gather feedback from the public on any aspects of engagement activity and for it to inform future developments.	Some attempts are made to gather feedback from the public on the institution's engagement activity but little is done to ensure it informs future developments.	Some attempts are made to gather feedback from the public on the institution's engagement activity and to ensure it informs future developments.	The institution invests in systematic evaluation of its engagement activity and uses the evidence to inform planning and strategy development. It shares the results of the evaluation with the public.